

STAEDEAN – Life Sciences Solution

Installation Guide for a Microsoft Dynamics 365 for Finance and Supply Chain Environment

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1. INTRODUCTION

1.1 Purpose

Microsoft's current best practices and requirements about the implementation and management of Microsoft Dynamics 365 for Finance and Supply Chain Management (D365) environments demand a wide set of activities.

Lifecycle Services (LCS) for Microsoft Dynamics is a collaboration portal that provides an environment and a set of regularly updated services that can help manage the application lifecycle of your D365 implementations.

The deployment of new D365 cloud environments is done using LCS, and it requires specific activities described in this document.

1.2 Scope

This document describes the activities required to deploy a new D365 cloud environment.

The setups and configurations needed for PowerApps, Power Automate, PowerBI and Workflows are not in the scope of this document.

1.3 Referenced Documents

1. TEMPLATE
 - a. Infrastructure Overview (IOV).
2. LINKS
 - a. Microsoft Dynamics Lifecycle Services (LCS) link: <https://lcs.dynamics.com/v2>
 - b. Azure DevOps link: <https://azure.microsoft.com/en-us/services/devops/?nav=min>
 - c. Microsoft Azure link: <https://portal.azure.com>
 - d. Refer to Attachment A.

1.4 Responsibilities

The responsibilities are defined below.

1.5 Acronyms

D365	Microsoft Dynamics 365 for Finance and Supply Chain Management
LCS	Microsoft Dynamics Lifecycle Services
LSS	Life Sciences Solution
DB	Database

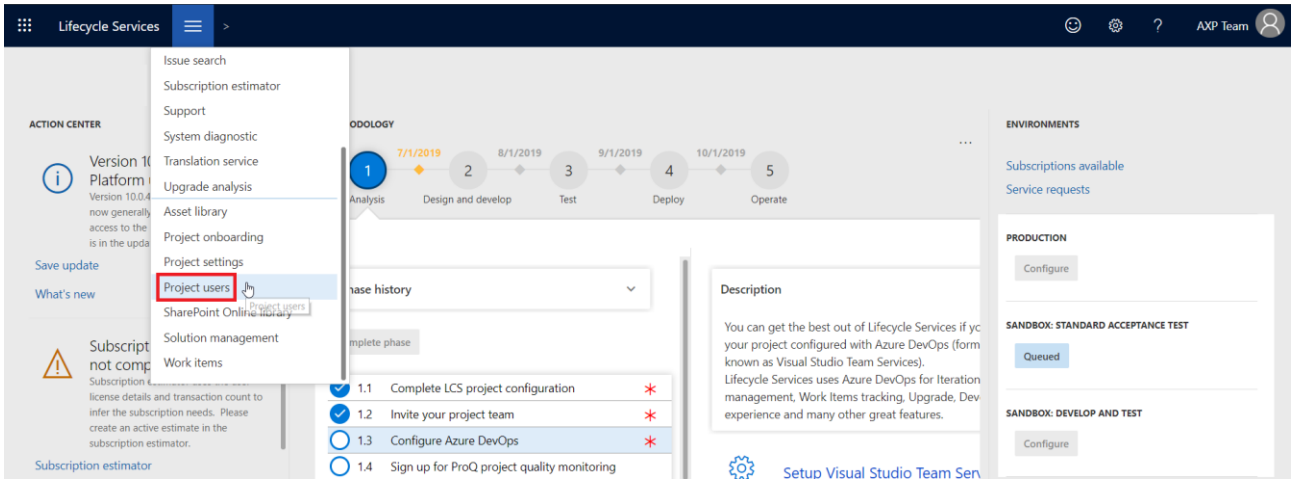
2. TEST AND DEVELOPMENT ENVIRONMENTS

To prepare the "Test" and "Development" environments of Microsoft Dynamics 365 for Finance and Supply Chain Management (D365), the Solution Architect has to:

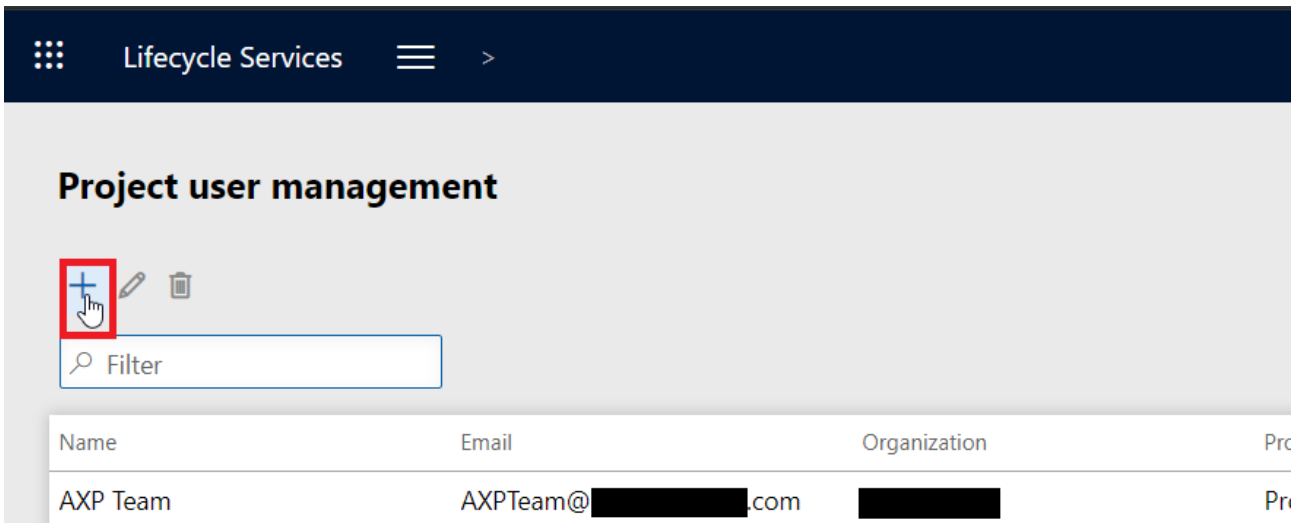
1. Connect to LCS (link: <https://lcs.dynamics.com/v2>) and select the project.
2. Setup the user.

Please note: it is mandatory to log on with a user's credentials that belong to the Customer's domain. This user must be a project owner – if not, add it as Project Owner following the steps below:

a. Select Project users:



b. Select "+";



c. Fill in the following fields as indicated below:

- i. **User lookup:** name and email of the new user (who belongs to the Customer's domain);
- ii. **Project security role:** Project Owner;
- iii. **Implementation role:** Architect.

d. Then click "Invite".

Invite user

User lookup

Email
 *

Project security role

Implementation role

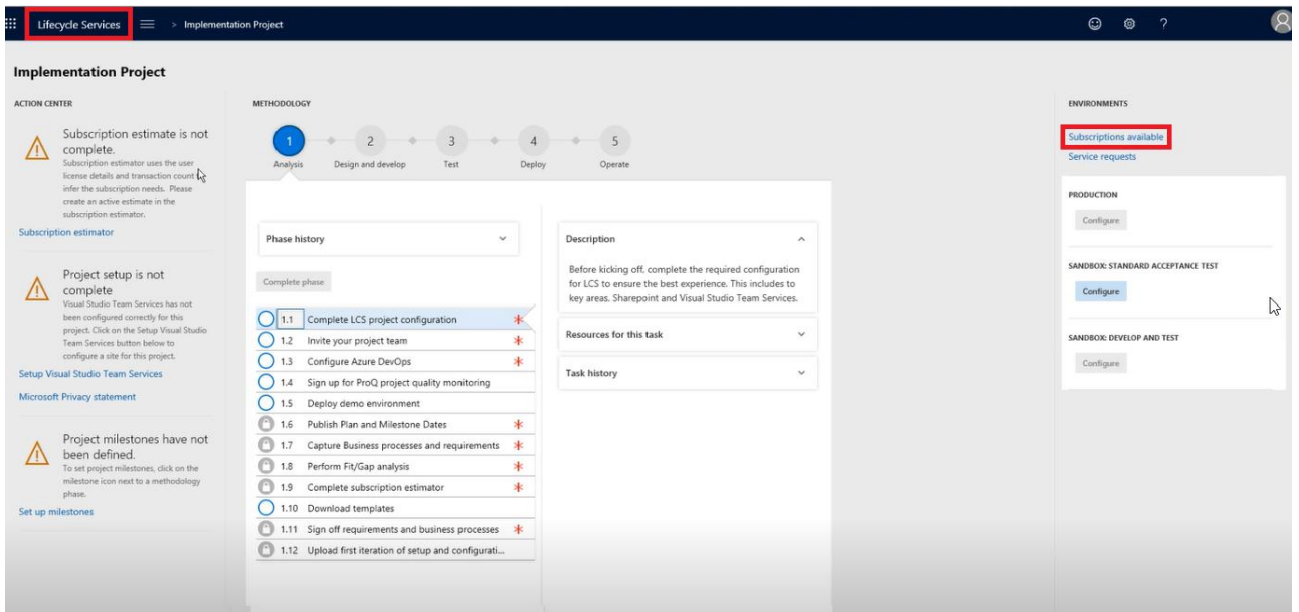
Allow service provider to contact
 No

When 'Allow service provider to contact' is Enabled we will contact the users in various implementation roles when appropriate. For example, Project Managers will be contacted for Go-live assessments and Architects will be contacted for Architect workshops.

Your privacy is important to us. Please do not include any personal or sensitive information. To learn more read our [Privacy Statement](#)

3. Verify subscription following the steps below:

a. Click "Subscription available";



b. Verify that at least one line of the license is available.

Subscriptions available

Tenant name
[REDACTED]

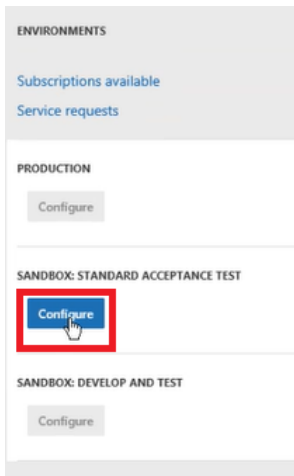
Tenant Id
[REDACTED]

Service plan name	Service plan id	Assigned date	Quantity	Status
Dynamics 365 Operations Enterprise user count	[REDACTED]	6/7/2019	20	Active
Dynamics 365 for Retail	[REDACTED]	6/7/2019	20	Active

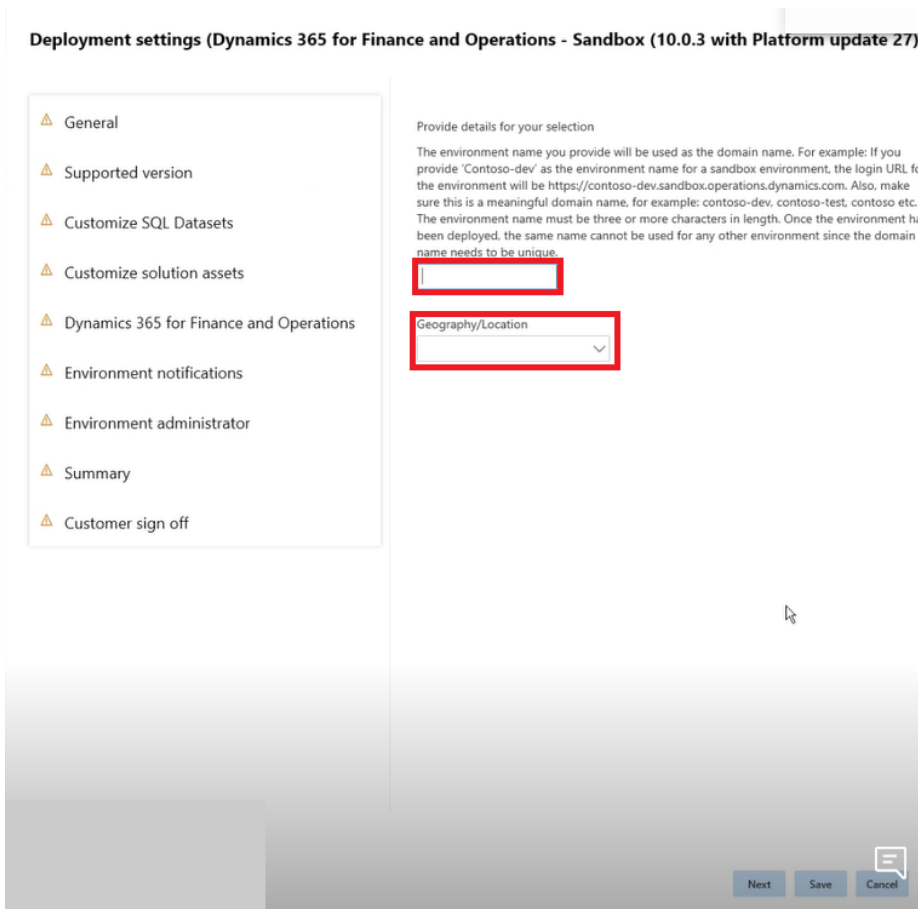
2.1 Preparation of a Test environment

To create the Test environment, the Solution architect has to perform the steps below:

1. Click "Configure" on the Standard Acceptance Test (SAT) environment.



2. Select the last version. If the version needed is not available in the dropdown menu, click "Change selected topology."
3. Fill in the following fields as indicated below:
 - a. Environment name: [Customer code]-sat;
 - b. **Geography/Location:** select the location closest to the Customer headquarter ⁽¹⁾.
4. Click "Next" (at the bottom of the page).



5. For each subsequent screen, leave the fields filled in by default and click "Next".
6. Select the Customer's user as in the screenshot below.

¹ The choice of the geography can require an analysis of the latencies from the offices. For more information, use can use [this tool](#) to verify latencies and [this page](#) for reference.

Provide details for your selection

The user selected below will become the environment administrator on the deployed environment. Only project users with the role Project Owner or Environment Manager in the same organization as this project are shown below. The selected user's email domain will be used to stamp the environment's tenant.

[Redacted] (admin@C... ▾)

7. Then, a summary of the compiled forms is then shown as below:

The screenshot shows a configuration summary page. On the left is a navigation pane with the following items:

- General (checked)
- Supported version (checked)
- Customize SQL Datasets (checked)
- Customize solution assets (checked)
- Dynamics 365 for Finance and Operations (checked)
- Environment notifications (checked)
- Environment administrator (checked)
- Summary (warning icon)
- Customer sign off (warning icon)

 The main content area on the right displays the following configuration details:

- Environment Name:** [Redacted]-sat
- Geography/Location:** [Redacted]
- SUPPORTED VERSION:** Choose from the available deployment versions: [Redacted]
- CUSTOMIZE SQL DATASETS:** Specify a dataset for Application database: None
- CUSTOMIZE SOLUTION ASSETS:** Microsoft.GER configuration files to be deployed: Yes
- DYNAMICS 365 FOR FINANCE AND OPERATIONS:** Publish this environment to Dynamics 365 home page: Enable
- ENVIRONMENT NOTIFICATIONS:** Additional users: [Redacted]@ [Redacted].com; [Redacted]@ [Redacted].com; [Redacted]@ [Redacted].com
- ENVIRONMENT ADMINISTRATOR:** The user selected below will become the environment administrator on the deployed environment. Only project users with the role Project Owner or Environment Manager in the same organization as this project are shown below. The selected user's email domain will be used to stamp the environment's tenant. [Redacted] (admin@[Redacted].[Redacted].com)

8. Insert the name indicated below in the **Type your user name here** field.
9. Click "Save". Then, click "Yes" to confirm the procedure.

- ✓ General
- ✓ Supported version
- ✓ Customize SQL Datasets
- ✓ Customize solution assets
- ✓ Dynamics 365 for Finance and Operations
- ✓ Environment notifications
- ✓ Environment administrator
- ✓ Summary
- ⚠ Customer sign off

Only users from the tenant [redacted] Inc.' can sign off or clear sign off for this deployment. This user will also be added as a system administrator for this instance. By typing in your name [redacted] and clicking Save you (i) agree to the below terms and (ii) certify the inputs you provided earlier are correct.

[Software License Terms](#) [Privacy Statement](#)

10. Then, a recap window is shown with the status of the environment that has been changed to "Queued":

ENVIRONMENTS

[Subscriptions available](#)

[Service requests](#)

PRODUCTION

[Configure](#)

SANDBOX: STANDARD ACCEPTANCE TEST

[Queued](#)

SANDBOX: DEVELOP AND TEST

[Configure](#)

Microsoft requires some hours to prepare the environment and make it available.

2.2 Preparation of a Development environment

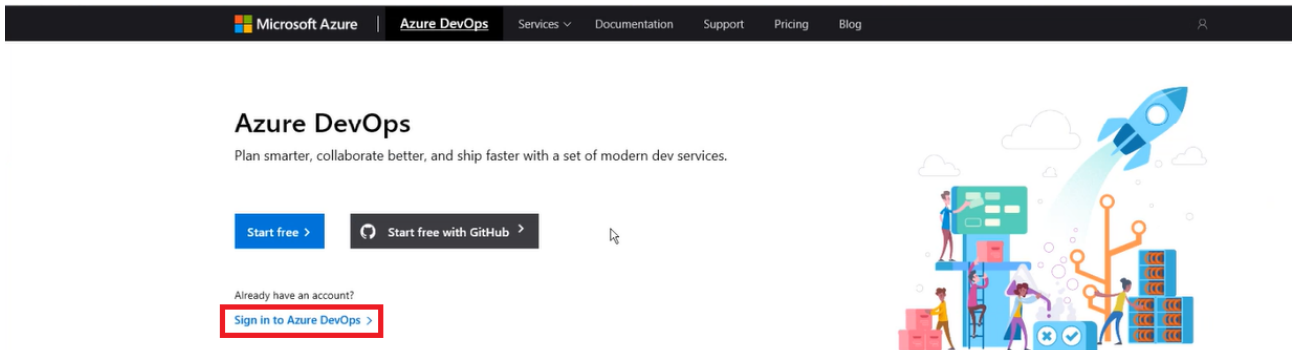
To create the Development environment, the Solution Architect has to set up Azure DevOps and connect an Azure connector to LCS in advance.

2.2.1 Setup DevOps

2.2.1.1 Create a new Organization

To set up the DevOps, the Solution Architect has to:

1. Open Azure DevOps (link: <https://azure.microsoft.com/en-us/services/devops/?nav=min>), already signed as the Customer's user.
2. Click "Sign in to Azure DevOps".



Use all the DevOps services or choose just what you need to complement your existing workflow

3. Fill in the following fields:
 - a. **User name.**
 - b. **User email.**
 - c. **From:** select the location closest to the Customer headquarter.

We need a few more details

Your name:

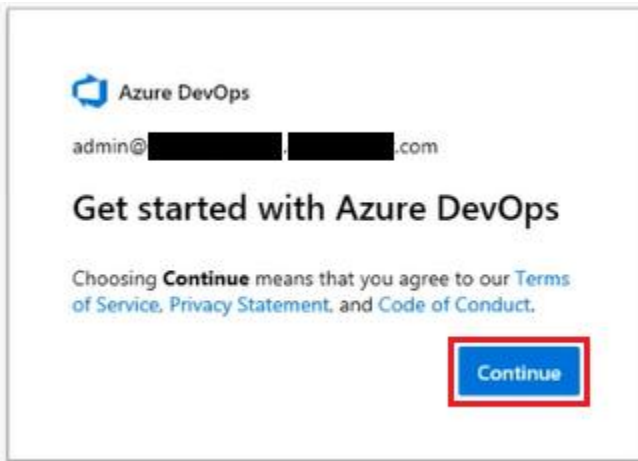
We'll reach you at:

From:

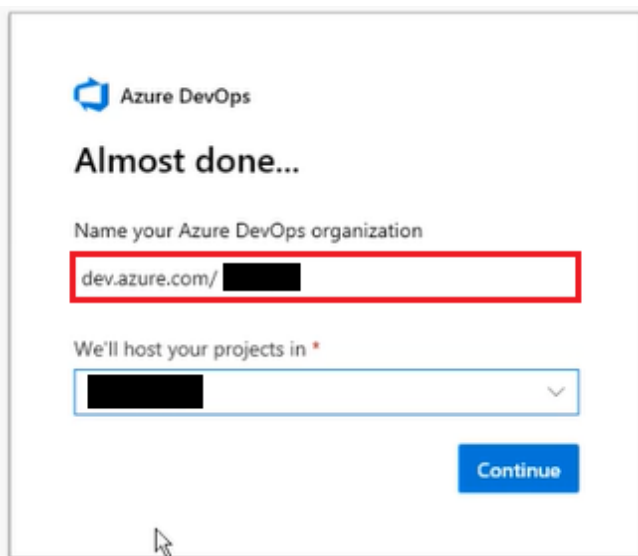
I would like to receive information, tips, and resources related to Microsoft developer tools and services, including Azure DevOps, Visual Studio, Visual Studio Subscriptions, and other Microsoft products and services.

To keep our lawyers happy:
 By continuing, you agree to the [Terms of Service](#), [Privacy Statement](#), and [Code of Conduct](#).

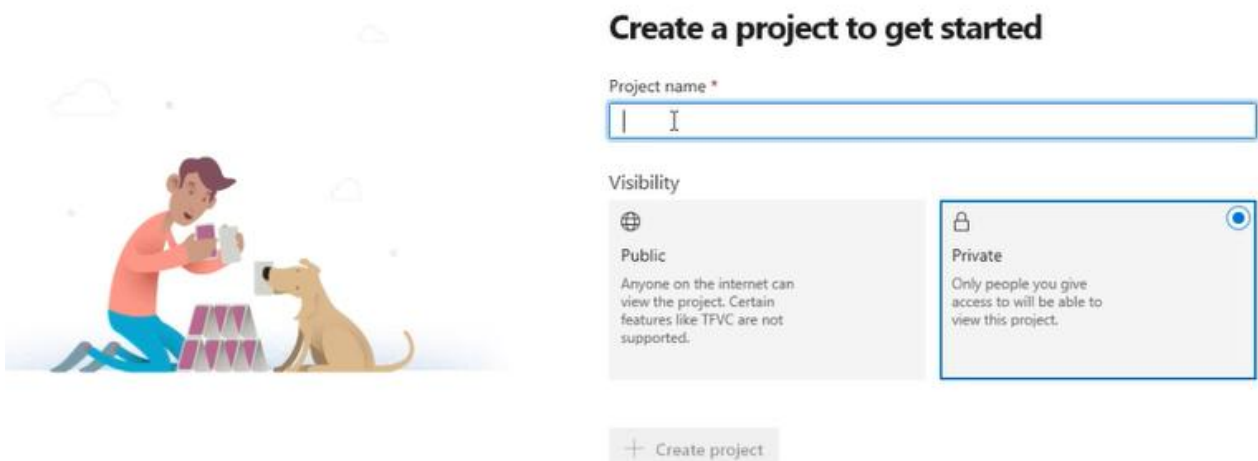
4. In the following forms, click "Continue" to proceed to the "Create a project to get start" form.



- Copy the link available in the "Name your Azure DevOps organization" field. This is the DevOps URL.



- When it is displayed, close the "Create a project get started" form.

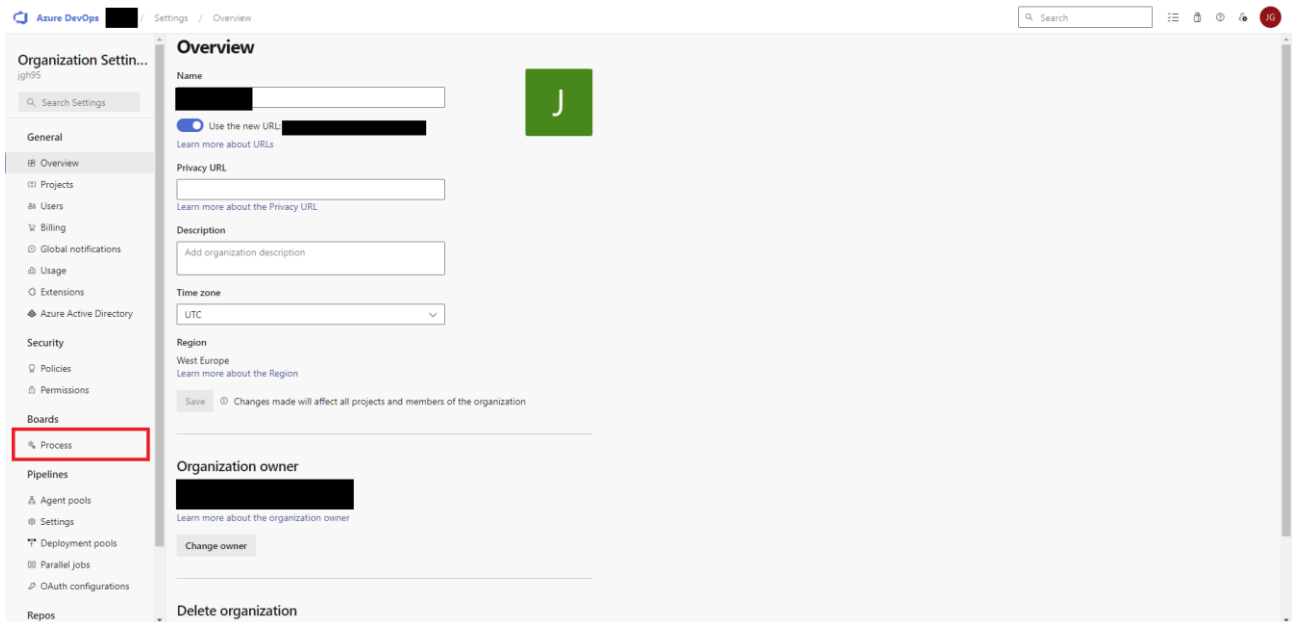


2.2.1.2 Create "SDN" process

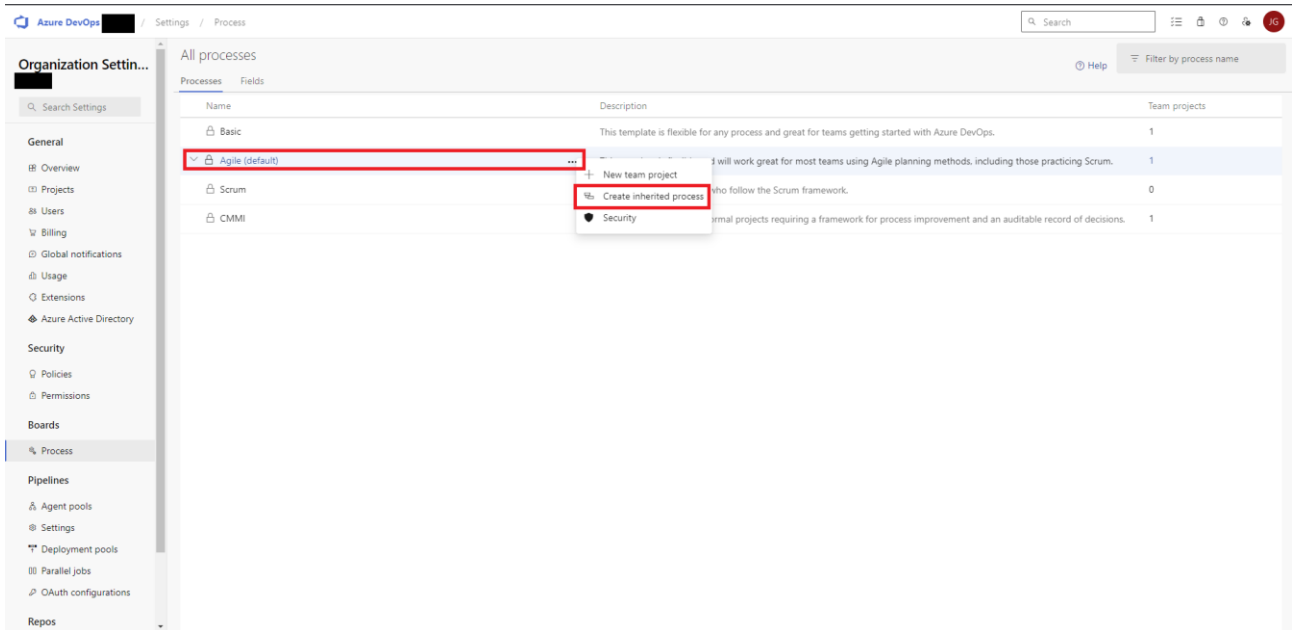
- Open Azure DevOps (link: <https://azure.microsoft.com/en-us/services/devops/?nav=min>), already signed as the Customer's user.
- Click on **Organization settings**:



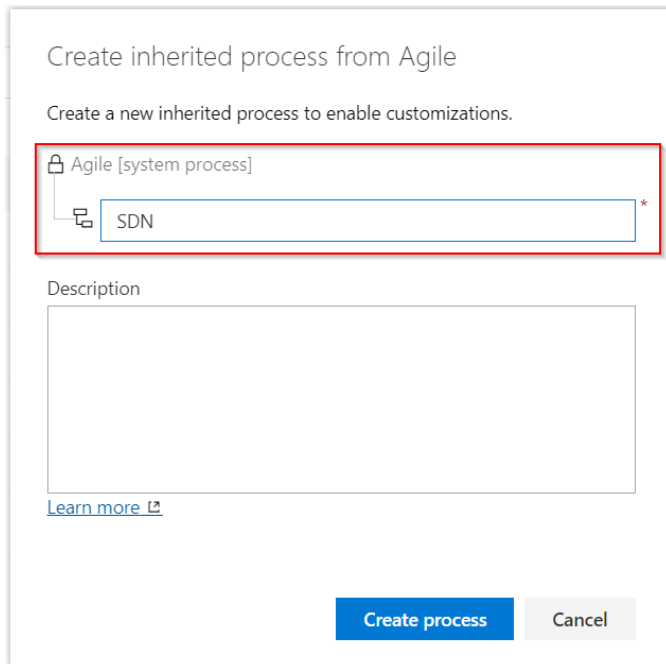
3. Under **Boards**, click on **Process**:



4. Select the “Agile process” and click on “...” then click on **Create inherited process from Agile**:



5. Insert "SDN" and click **Create process**:



Note: SDN will further provide instructions to configure the process structure or will configure the process structure depending on customer's policies.

2.2.1.3 Create a new Project


1. Click "New project".
2. Click "Advanced".

Create new project ×


Project name *

Description

Visibility

 **Public**

Anyone on the internet can view the project. Certain features like TFVC are not supported.

 **Private**

Only people you give access to will be able to view this project.

^ Advanced

Version control ?

Work item process ?


3. Change the Project name.

Create a project to get started


Project name *

Description

Visibility

 **Public**

Anyone on the internet can view the project. Certain features like TFVC are not supported.

 **Private**

Only people you give access to will be able to view this project.

^ Advanced

Version control ?

Work item process ?

+ Create project

4. Select Private (under the Advanced section).
5. Fill in the fields as indicated below:
 - a. **Version control:** Team Foundation Version Control;
 - b. **Work item process:** SDN.

Create new project ✕

Project name *

Description

Visibility

Public

Anyone on the internet can view the project. Certain features like TFVC are not supported.

Private

Only people you give access to will be able to view this project.

Public projects are disabled for your organization. You can turn on public visibility with [organization policies](#).

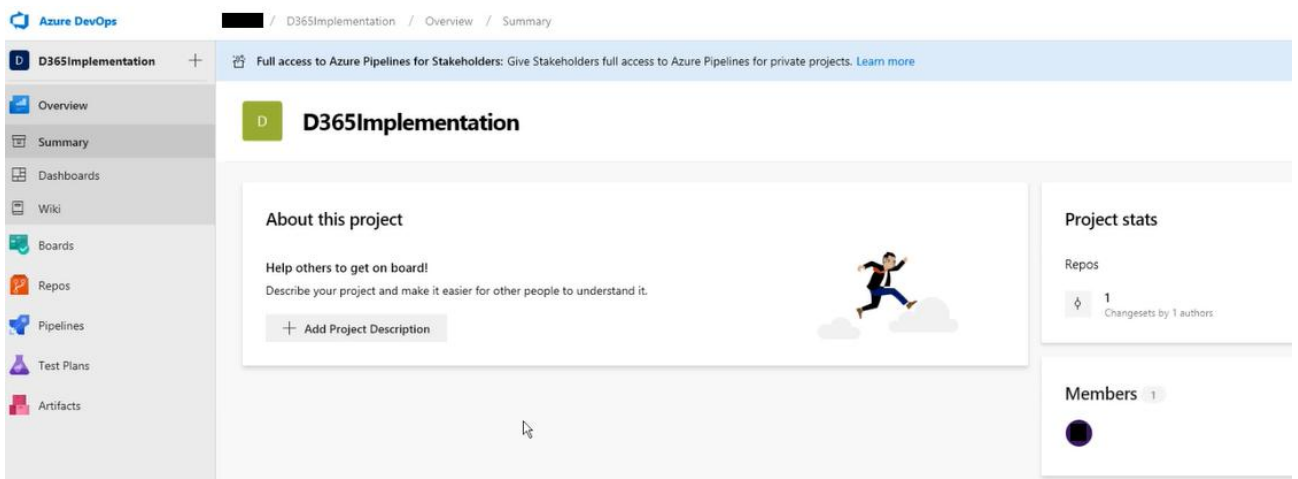
^ Advanced

Version control ⓘ

Work item process ⓘ

[Show description](#)

6. Click "Create".



2.2.2 Copy the Azure DevOps URL to LCS

1. Open LCS (link: <https://lcs.dynamics.com/v2>) and click the project.
2. On the list of the points of the Analysis phase, select point 1.3 "Configure Azure DevOps".

Lifecycle Services > Implementation Project

Implementation Project

ACTION CENTER

Version 10.0.3 with Platform update 27
Version 10.0.3 with Platform update 27 is now generally available. For getting access to the update and viewing what is in the update check the links below.

[Save update](#)

[What's new](#)

Subscription estimate is not complete.
Subscription estimator uses the user license details and transaction count to infer the subscription needs. Please create an active estimate in the subscription estimator.

[Subscription estimator](#)

Project setup is not complete
Visual Studio Team Services has not been configured correctly for this project. Click on the Setup Visual Studio Team Services button below to configure a site for this project.

[Setup Visual Studio Team Services](#)

[Microsoft Privacy statement](#)

METHODOLOGY

Phase history

Complete phase

- 1.1 Complete LCS project configuration *
- 1.2 Invite your project team *
- 1.3 Configure Azure DevOps *
- 1.4 Sign up for ProQ project quality monitoring
- 1.5 Deploy demo environment
- 1.6 Publish Plan and Milestone Dates *
- 1.7 Capture Business processes and requirements *
- 1.8 Perform Fit/Gap analysis *
- 1.9 Complete subscription estimator *
- 1.10 Download templates
- 1.11 Sign off requirements and business processes *
- 1.12 Upload first iteration of setup and configurati...

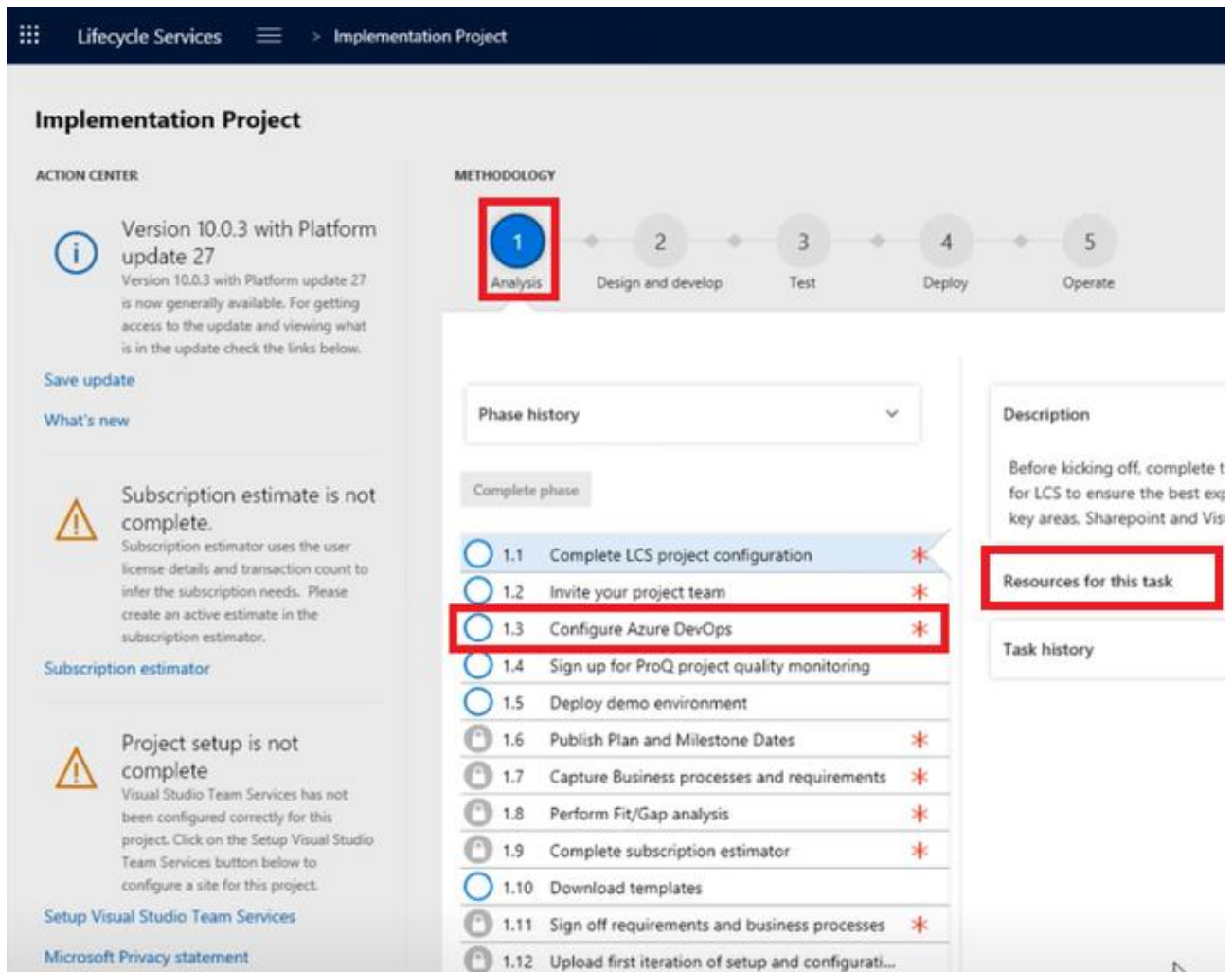
Description

Before kicking off, complete t for LCS to ensure the best ex key areas, Sharepoint and Vis

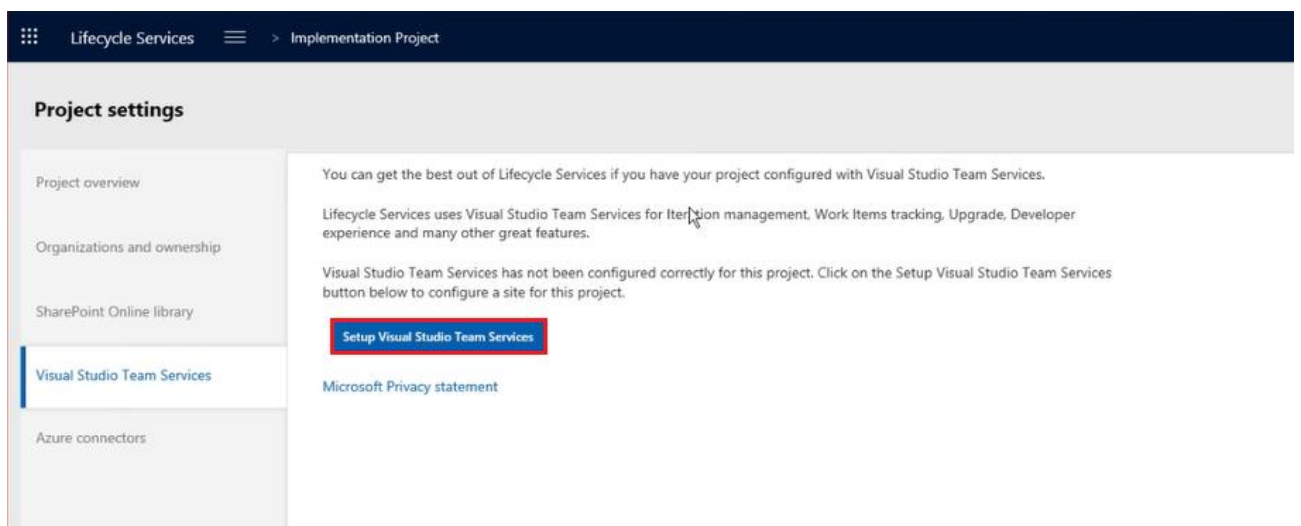
Resources for this task

Task history

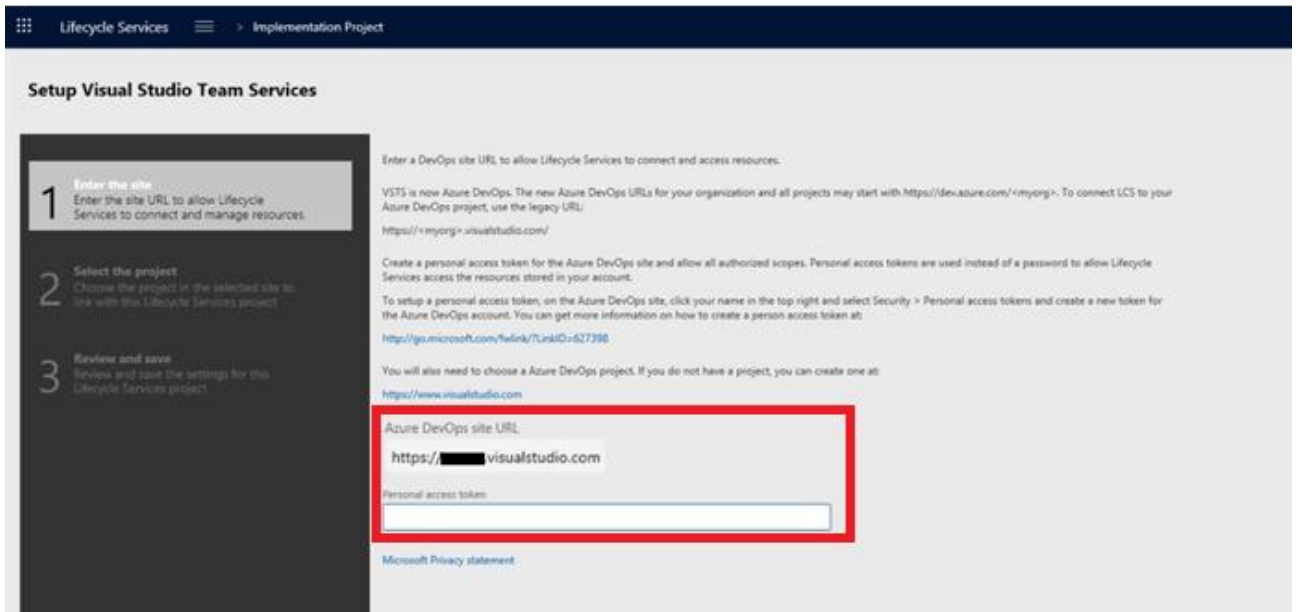
3. Click "Resources for this task".



4. Click the "Setup Visual Studio Team Services" button.

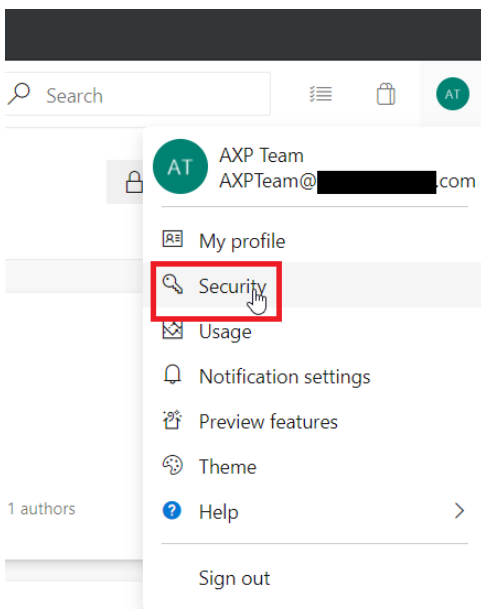
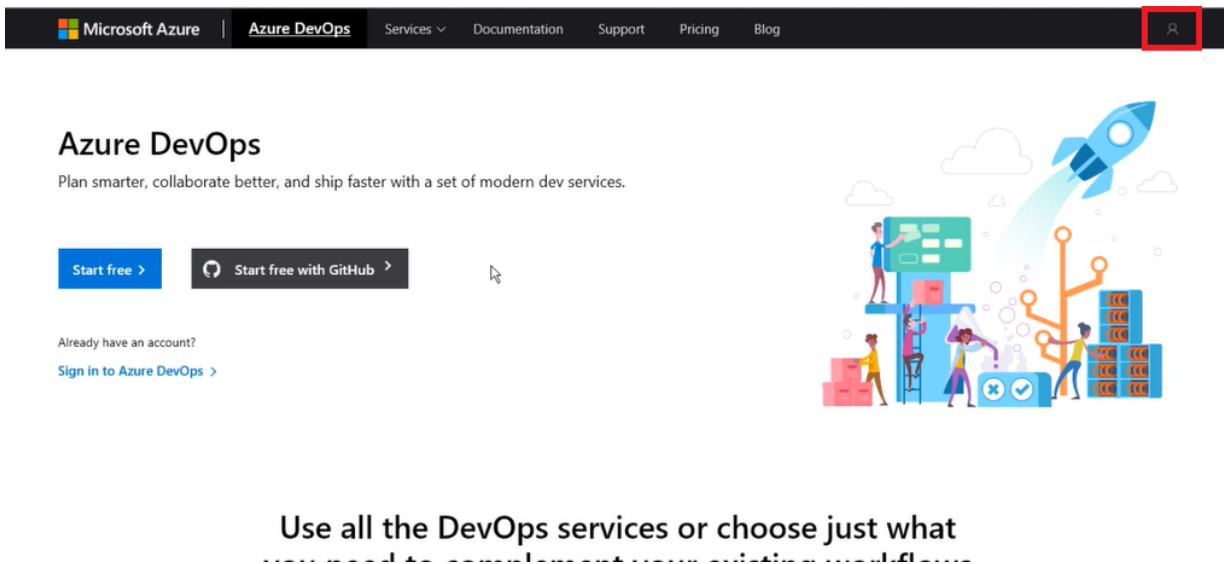


5. Paste the DevOps URL in the Azure DevOps site URL field. If it doesn't work, please insert the old DevOps URL as in the screenshot below.



2.2.3 Create a personal access token on DevOps

1. Click your name code on the right side > **Security** > **New token**.



2. Tick on "Full access". Then click "Create".

Create a new personal access token ✕

Name

Organization

Expiration (UTC)
 Tue Jun 23 2020

Scopes
 Authorize the scope of access associated with this token
 Scopes
 Full access Custom defined

3. Save and copy the token and paste it to LCS.

Lifecycle Services > Implementation Project

Setup Visual Studio Team Services

- 1 Enter the site
Enter the site URL to allow Lifecycle Services to connect and manage resources.
- 2 Select the project
Choose the project in the selected site to link with this Lifecycle Services project.
- 3 Review and save
Review and save the settings for this Lifecycle Services project.

Enter a DevOps site URL to allow Lifecycle Services to connect and access resources.
 VSTS is now Azure DevOps. The new Azure DevOps URLs for your organization and all projects may start with <https://dev.azure.com/><myorg>. To connect LCS to your Azure DevOps project, use the legacy URL:
<https://<myorg>.visualstudio.com/>

Create a personal access token for the Azure DevOps site and allow all authorized scopes. Personal access tokens are used instead of a password to allow Lifecycle Services access the resources stored in your account.
 To setup a personal access token, on the Azure DevOps site, click your name in the top right and select Security > Personal access tokens and create a new token for the Azure DevOps account. You can get more information on how to create a person access token at <http://go.microsoft.com/fwlink/?LinkID=627396>

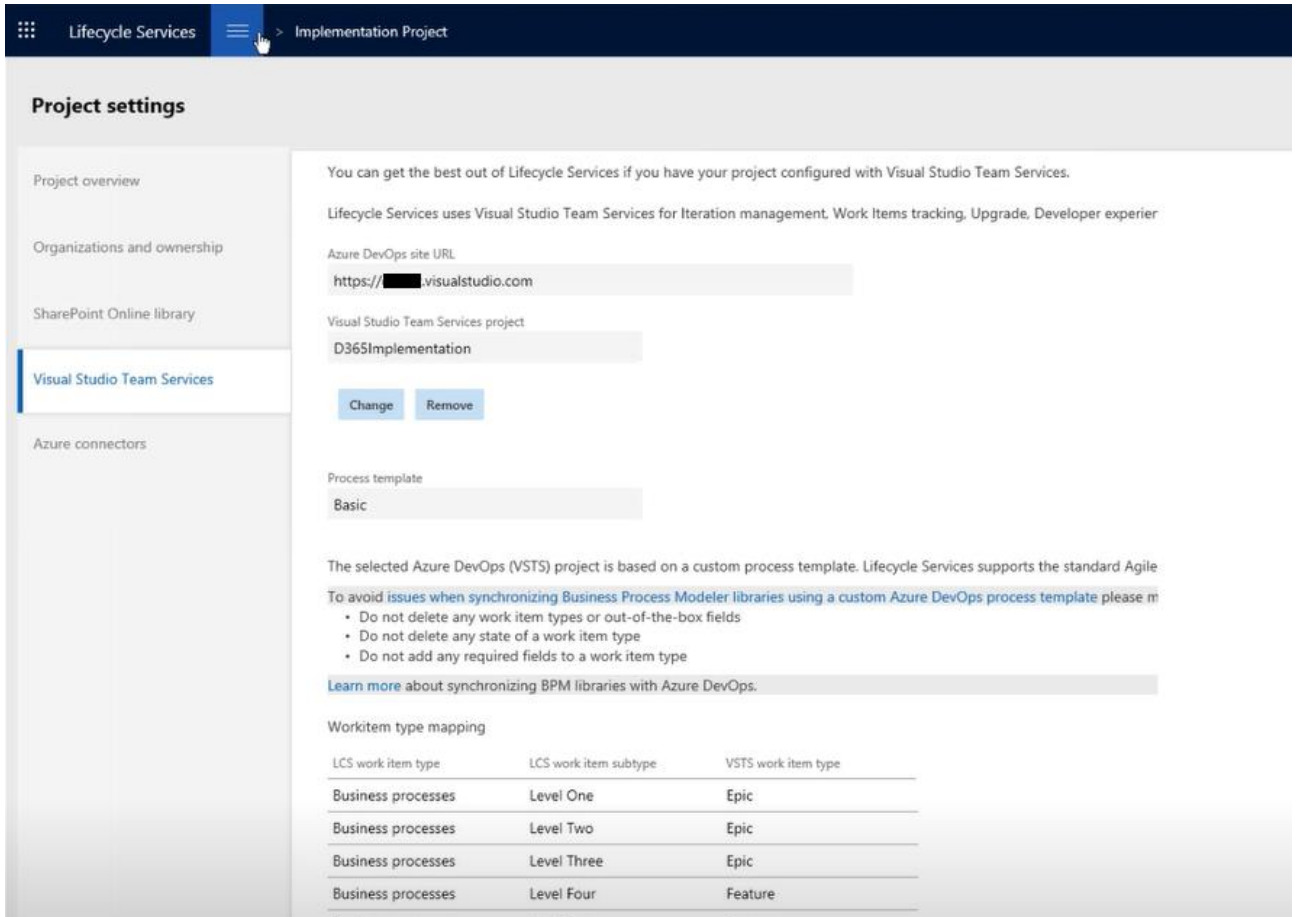
You will also need to choose an Azure DevOps project. If you do not have a project, you can create one at <https://www.visualstudio.com>

Azure DevOps site URL:

Personal access token:

[Microsoft Privacy statement](#)

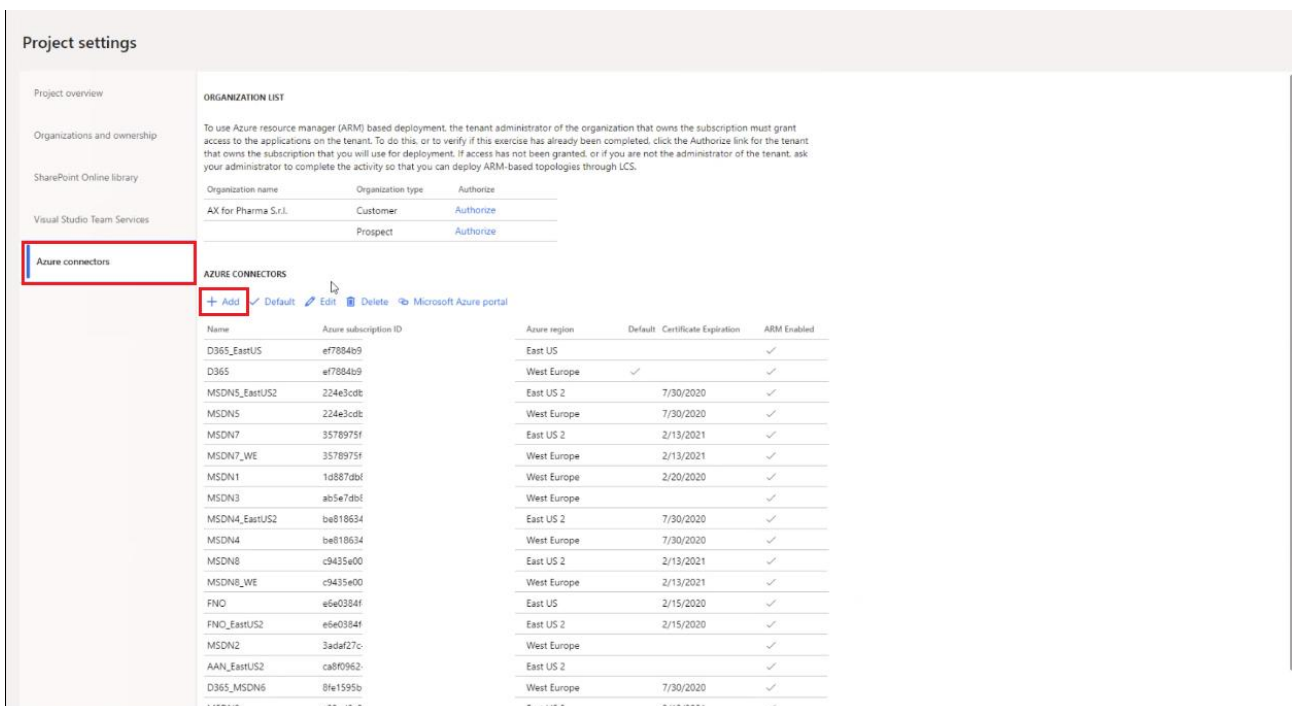
4. Click "Continue".



5. Select the Visual Studio Team Services project dropdown to link with this Lifecycle Services project.
6. Click "Continue".
7. Click "Save".

2.2.4 Add Azure Connector to LCS

1. Access LCS, go to **Project settings > Azure connectors** and click the button **Add**.



2. Enter the name of the connector and the **Azure subscription ID** (This is the ID connected to the Azure account found in **Subscriptions**).

Microsoft Azure setup

This tool will deploy an environment on Microsoft Azure.

An Azure subscription is required for deployment. If you don't have an Azure subscription, click the link below to get one.

Deployment to Azure requires full control over a subscription. Any services deployed will be billed at the Azure standard usage rate.

CONNECT TO YOUR AZURE SUBSCRIPTION

Name

Azure subscription ID

Configure to use Azure Resource Manager (ARM)
 No

[Sign up for Azure](#)

- Enter the **Azure subscription AAD Tenant Domain** and set the **Configure to use Azure Resource Manager (ARM)** to “Yes”.

Microsoft Azure setup

This tool will deploy an environment on Microsoft Azure.

An Azure subscription is required for deployment. If you don't have an Azure subscription, click the link below to get one.

Deployment to Azure requires full control over a subscription. Any services deployed will be billed at the Azure standard usage rate.

CONNECT TO YOUR AZURE SUBSCRIPTION

Name

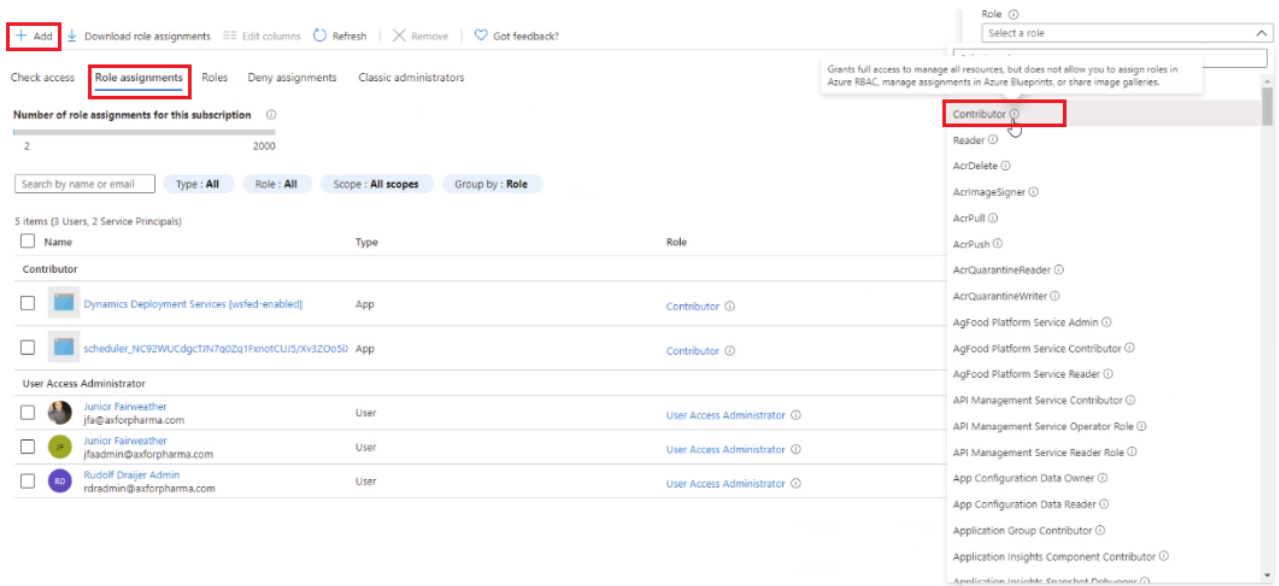
Azure subscription ID

Azure subscription AAD Tenant Domain (or ID)

Configure to use Azure Resource Manager (ARM)
 Yes

[Sign up for Azure](#)

- Access the Azure portal, select the used subscription and assign it the “Contributor” **Role (Access control > Role assignment > Add > Add role assignment)**. Note: under the field **Select** the user should pick the option “Dynamics Deployment Services”.



Microsoft Azure setup

In order to complete the setup for this Azure connector, the following applications require access to your subscription. Please navigate to the Azure portal, select your subscription and assign the appropriate role(s) to these application(s) before you hit Next.

[Click here to navigate to the Azure portal](#)

Name	Expected role	Valid
Dynamics Deployment Services [wsfed-enabl...	Contributor	✓

- Go back to LCS and download the management certificate by clicking on **Download**.

Microsoft Azure setup

Deployment to Azure requires full control over a subscription. Any services deployed will be billed at the Azure standard usage rate.

TO AUTHORIZE, DO ONE OF THE FOLLOWING:

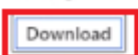
ENSURE YOU ARE A SUBSCRIPTION USER

Go to the Azure Portal and navigate to this subscription. Select the 'Access Control (IAM)' panel and ensure that you (FNO@axforpharma.com) are directly added as a user with any role for that subscription.

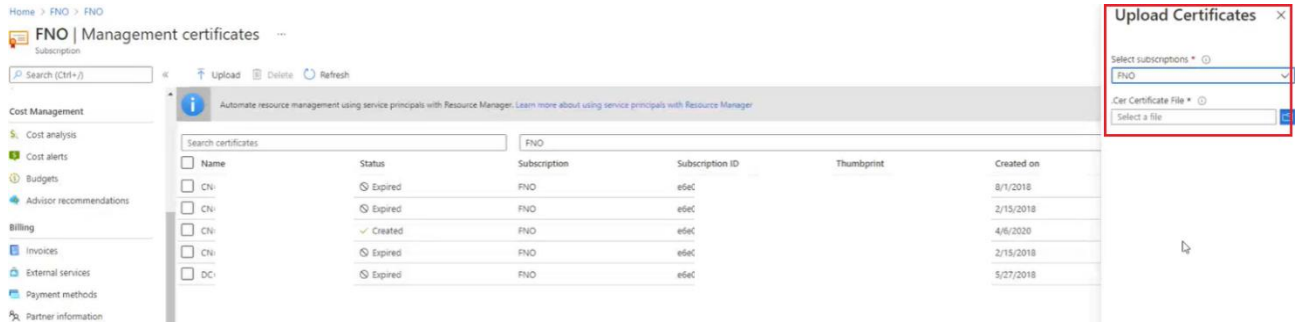
OR:

DOWNLOAD THE MANAGEMENT CERTIFICATE

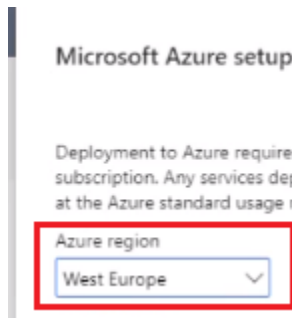
This certificate will enable Lifecycle Services to communicate with Azure on your behalf. Download this management certificate to your local computer. Then, upload the management certificate to the Azure management portal (Settings > Management Certificates).



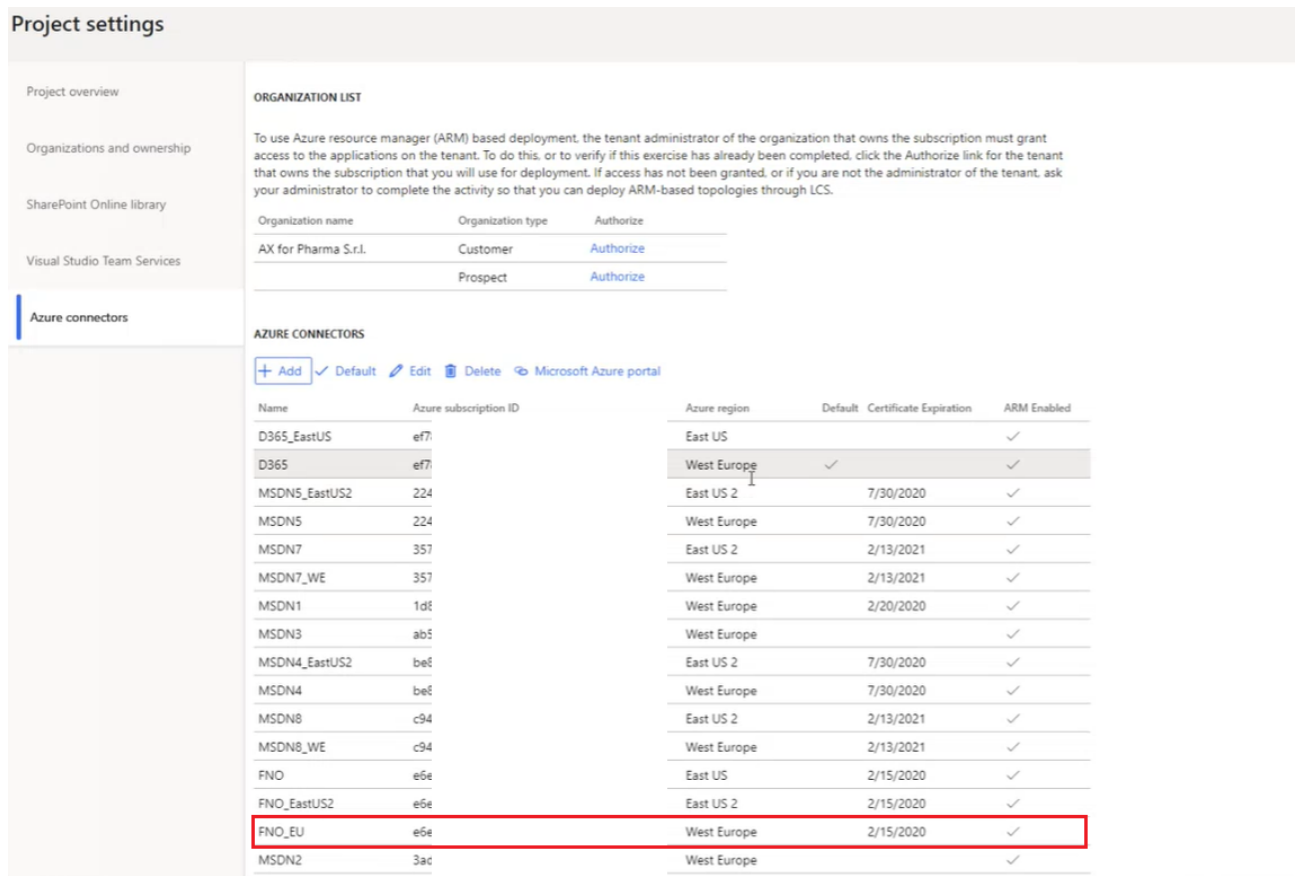
- Access the Azure portal, go to **Setting > Management certificate** and upload the management certificate downloaded during step 5.



- Go back to LCS and select the **Azure region** (the region that will host the servers of the virtual machines).

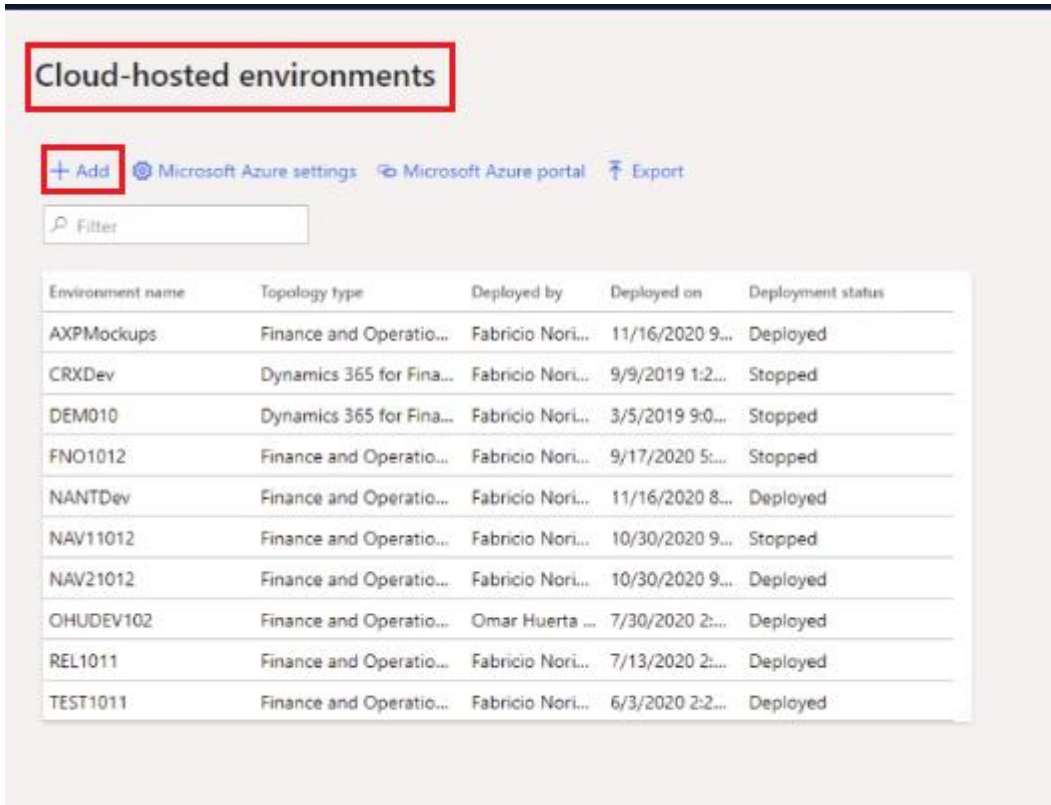


- The connector has been added in **Azure connectors**.



2.2.5 Create the Development environment

- Access LCS, go to **Cloud hosted environments** and click **Add**.



2. Select the **Application version** and the **Platform version** (check with SDN the correct values to select).

Select application and platform version

The screenshot shows a form with two dropdown menus. The first dropdown is labeled 'Application version' and has '10.0.15' selected. The second dropdown is labeled 'Platform version' and has 'Platform Update 39' selected. Both dropdowns are highlighted with a red box.

3. Select the environment topology “DEVTEST” – “Finance and Operations - Develop”.

Select environment topology

The screenshot shows a form titled 'Please select a topology to deploy'. There are two options listed: 'DEMO' with the description 'Deploy an environment for demonstration purposes.' and 'DEVTEST' with the description 'Deploy an environment for development, test, build.'. Both options are highlighted with a red box.

Select environment topology

Please select a topology to deploy

Finance and Operations - Build and Test (10.0.15 with Platform update 39)

Deploy this environment for team development on Finance and Operations 10.0.15.

Finance and Operations - Develop (10.0.15 with Platform update 39)

Deploy this environment for team development on Finance and Operations 10.0.15.

4. Select the **Azure connector** configured in paragraph 2.2.4.

Select Azure connector

Please select an Azure connector to deploy

D365_EastUS

Subscription ID: e7884t
Azure region: East US

D365

Subscription ID: e7884t
Azure region: West Euro

MSDN5_EastUS2

Subscription ID: 224e3cc
Azure region: East US 2

MSDN5

Subscription ID: 224e3cc
Azure region: West Euro

MSDN7

Subscription ID: 357897f
Azure region: East US 2

MSDN7_WE

Subscription ID: 357897f
Azure region: West Euro

MSDN1

Subscription ID: 1d887df
Azure region: West Euro

- Select the virtual machine **Size** (e.g., "E4v3" - check with SDN the correct value to select).

Deploy environment

Finance and Operations - Develop (10.0.15 with Platform update 39) v 69

Environment name

DEV01

Advanced settings

Virtual Machine	Instances	Size
Developer	1	DS12 v2

Total deployments:
1 x DS12 v2

- Go to **Advanced settings > Customize SQL Database Configuration** and select the environment database to "None".

Deployment settings

Visual Studio Customization	>
Supported version	>
Customize SQL Database Configuration	>
Disk space configuration	>
Premium Storage Settings	>
Managed Disk Settings	>
Customize virtual machine names	>
Common Data Service	>
Dynamics 365 for Finance and Operations	>
Customize virtual network	>

AX DATABASE (DEVELOPER VM)

Specify a dataset for Application database

Demo

None

Demo

AX Public Sector DemoData

DEVELOPER VM)

ing database

- Go to **Advanced settings > Disk space configuration** and enter the number of disks to attach to the virtual machines (at least 3) and the size in GB of the disks (at least 128 GB).

Deployment settings

- Visual Studio Customization >
- Supported version >
- Customize SQL Database Configuration >
- Disk space configuration >**
- Premium Storage Settings >
- Managed Disk Settings >
- Customize virtual machine names >
- Common Data Service >
- Dynamics 365 for Finance and Operations >
- Customize virtual network >

DEV VIRTUAL MACHINES

Enter the maximum number of disks to attach to the Dev virtual machines:

Enter the size, in GB, of the disks that will be attached to the Dev virtual machines:

- Go to **Advanced settings > Managed Disk Settings**, choose the type of disk and click **Done**.

Deployment settings

- Visual Studio Customization >
- Supported version >
- Customize SQL Database Configuration >
- Disk space configuration >
- Premium Storage Settings >
- Managed Disk Settings >**
- Customize virtual machine names >
- Common Data Service >
- Dynamics 365 for Finance and Operations >
- Customize virtual network >

DEV VIRTUAL MACHINES

Choose type of Managed Disk

9. Tick the checkbox to agree to Azure pricing and licensing terms and click on **Next**.

Deploy environment

Finance and Operations - Develop (10.0.15 with Platform update 39) v 69

Environment name

DEV01

Advanced settings

Virtual Machine	Instances	Size
Developer	1	DS12 v2

Total deployments:
1 x DS12 v2

By selecting this checkbox, you agree to the pricing and licensing terms below.

[Microsoft Dynamics Software License Terms](#)

[Privacy Statement](#)

[Azure price list](#)

Next Cancel

10. Click on **Deploy**.

Are you sure you want to deploy?

You are about to deploy: 1 x DS12 v2

You will be billed according to the Azure price list

[Azure price list](#)

Deploy Deploy Cancel

3. MOBILE APPLICATION

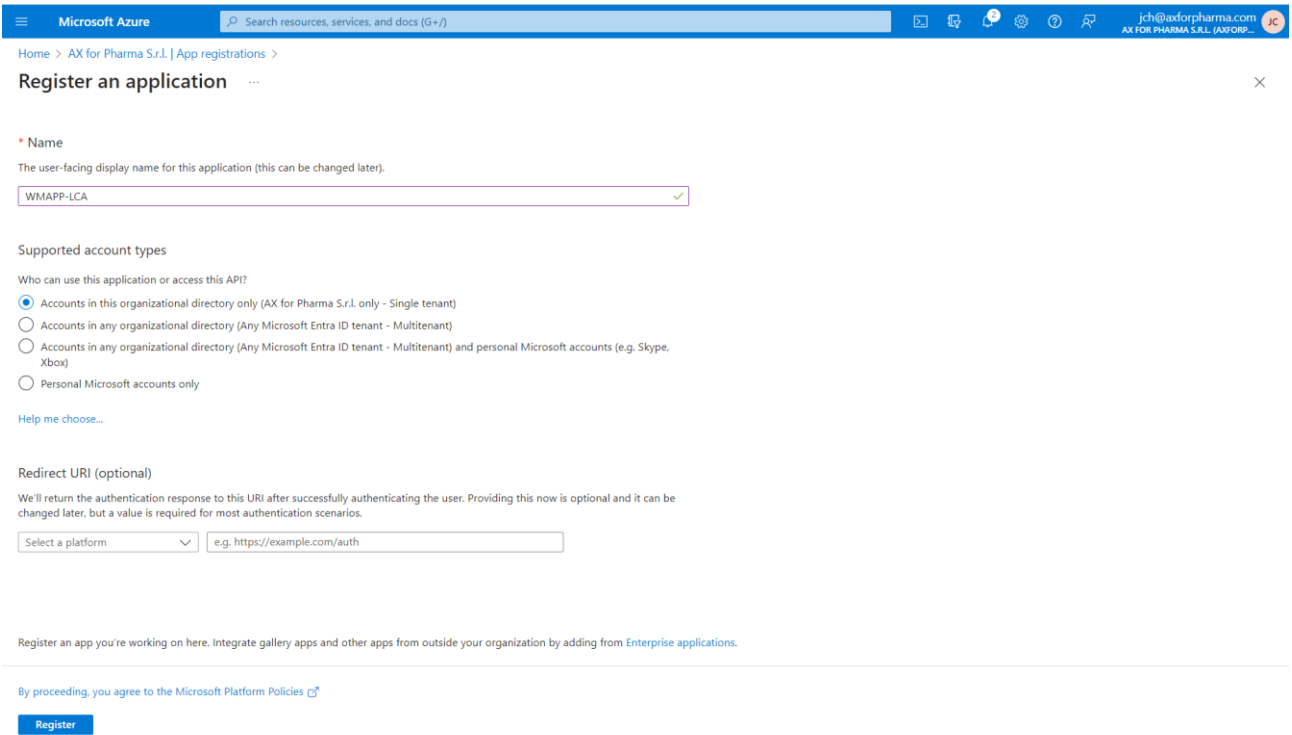
3.1 Authentication method

The Warehouse management app currently supports the device code flow as user-based authentication.

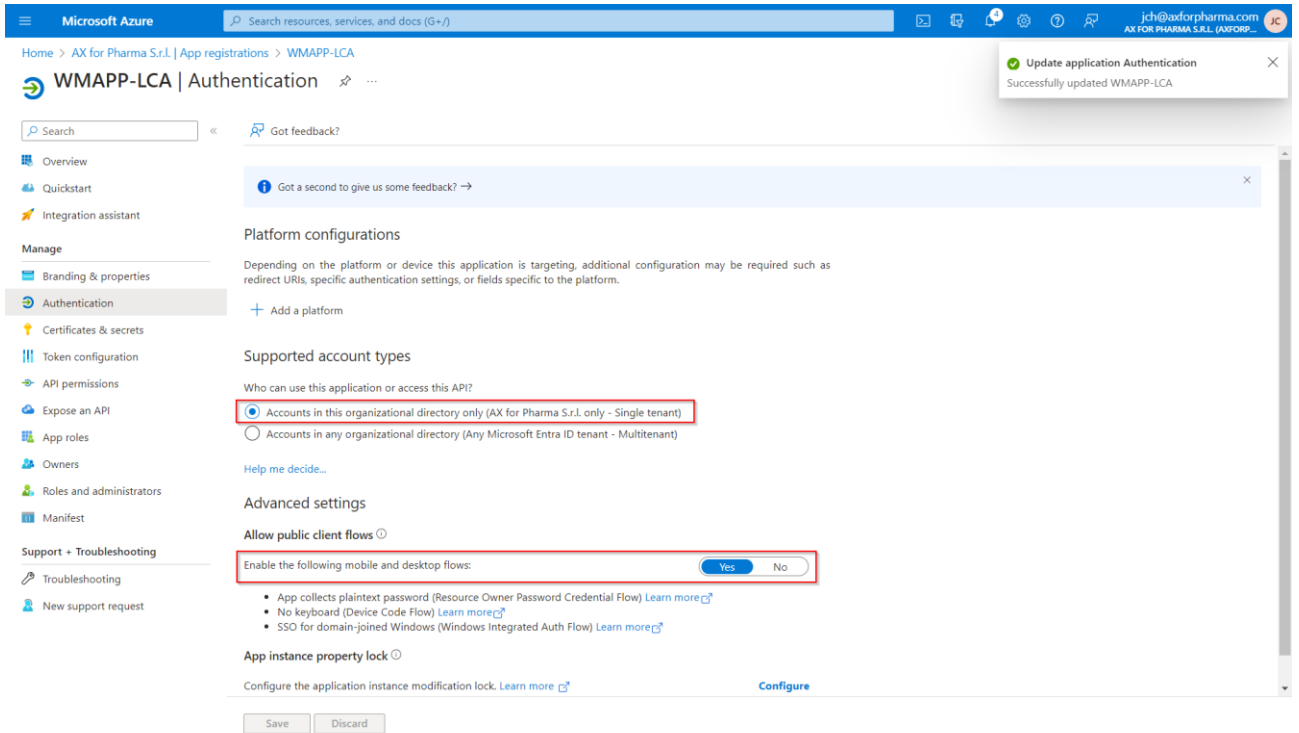
You must decide if the device code represents the device itself or a certain user who is going to use the device. If the device code represents the device itself, dedicated service users are required to be created for each device whether on the physical scanners or opening on the desktop. If the device code represents a certain user, dedicated service users are required to be created for each user per each device whether on the physical scanners or opening on the desktop.

3.2 Create applications

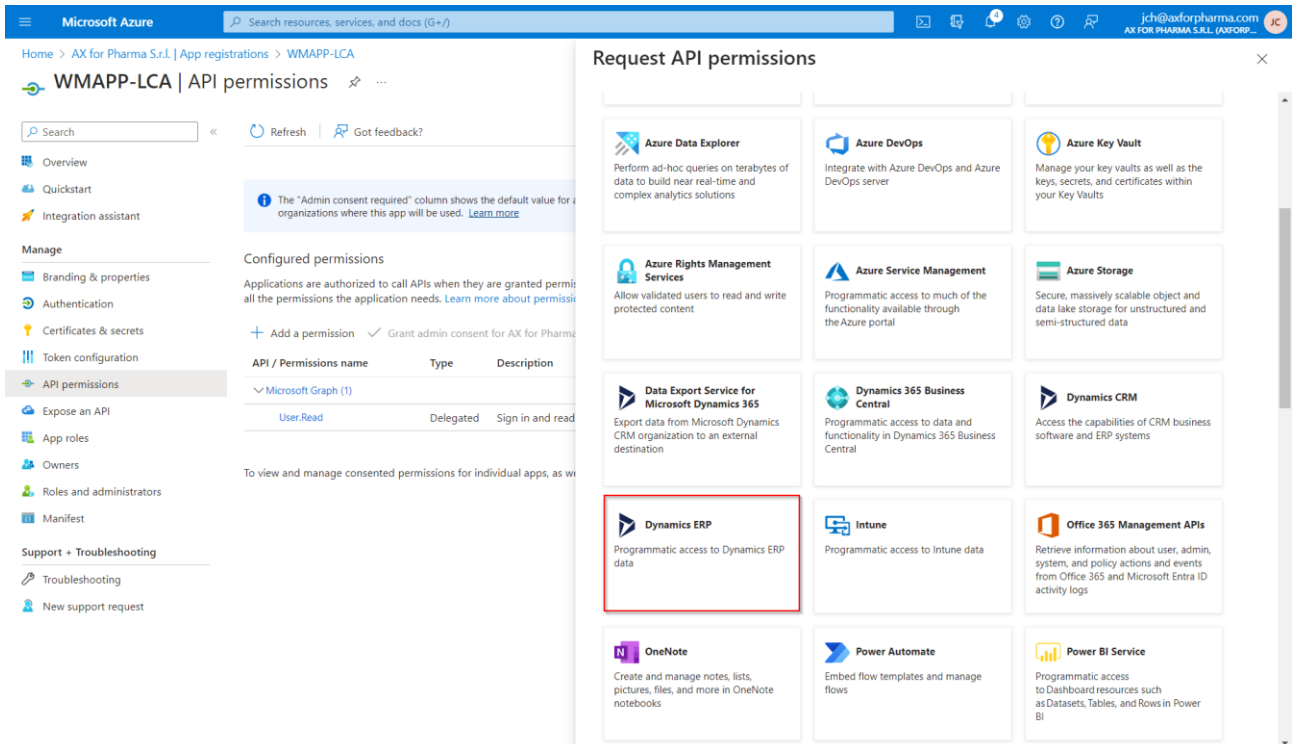
1. Go to Microsoft Azure (link: <https://portal.azure.com>).
2. Click "Microsoft Entra ID" on the left.
3. In the **Manage** list, click "App registrations".
4. On the toolbar, select "New registration" to open the **Register an application** wizard.
5. Enter a name for the application, select the **Accounts in this organizational directory only** option, and then select **Register**.

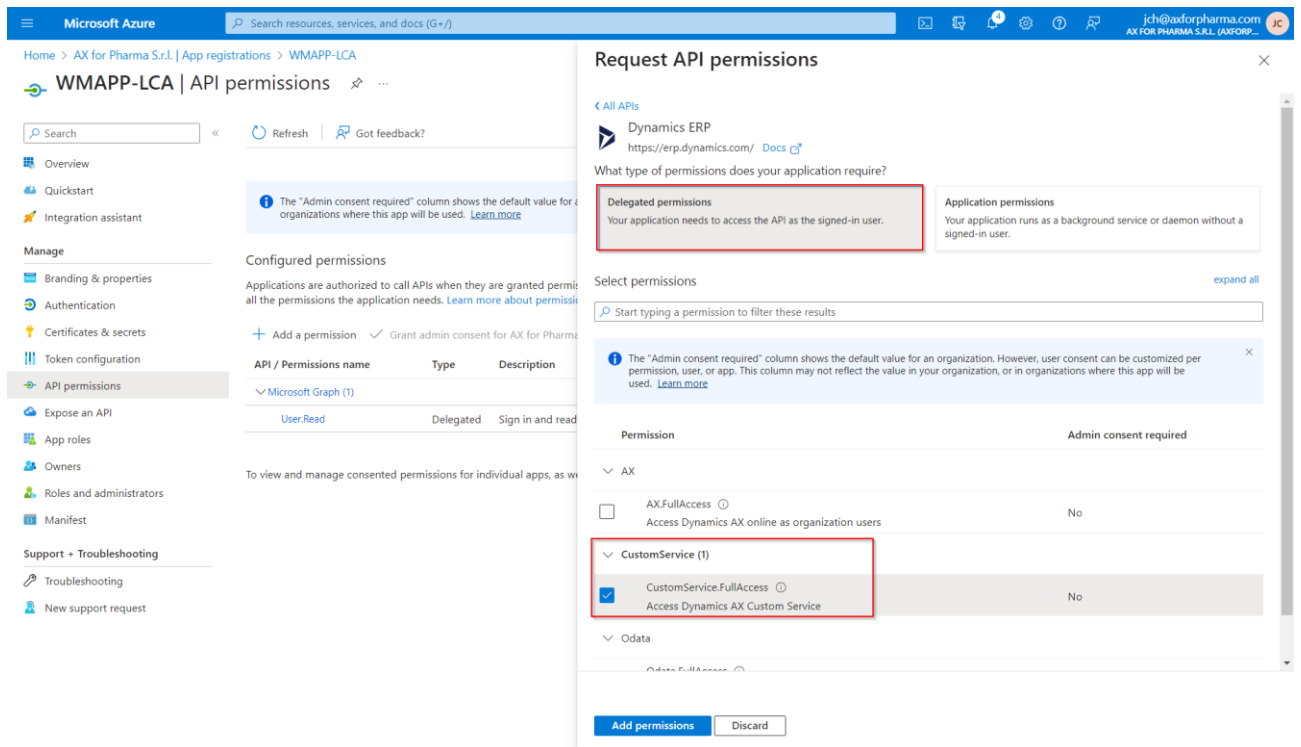


6. Make a note of the **Application (client) ID** value. This ID will be referred to as the *client ID*.
7. In the **Manage** list, select "Authentication".
8. Set the **Enable the following mobile and desktop flows** option to Yes to enable the device code flow for your application. Then select **Save**.

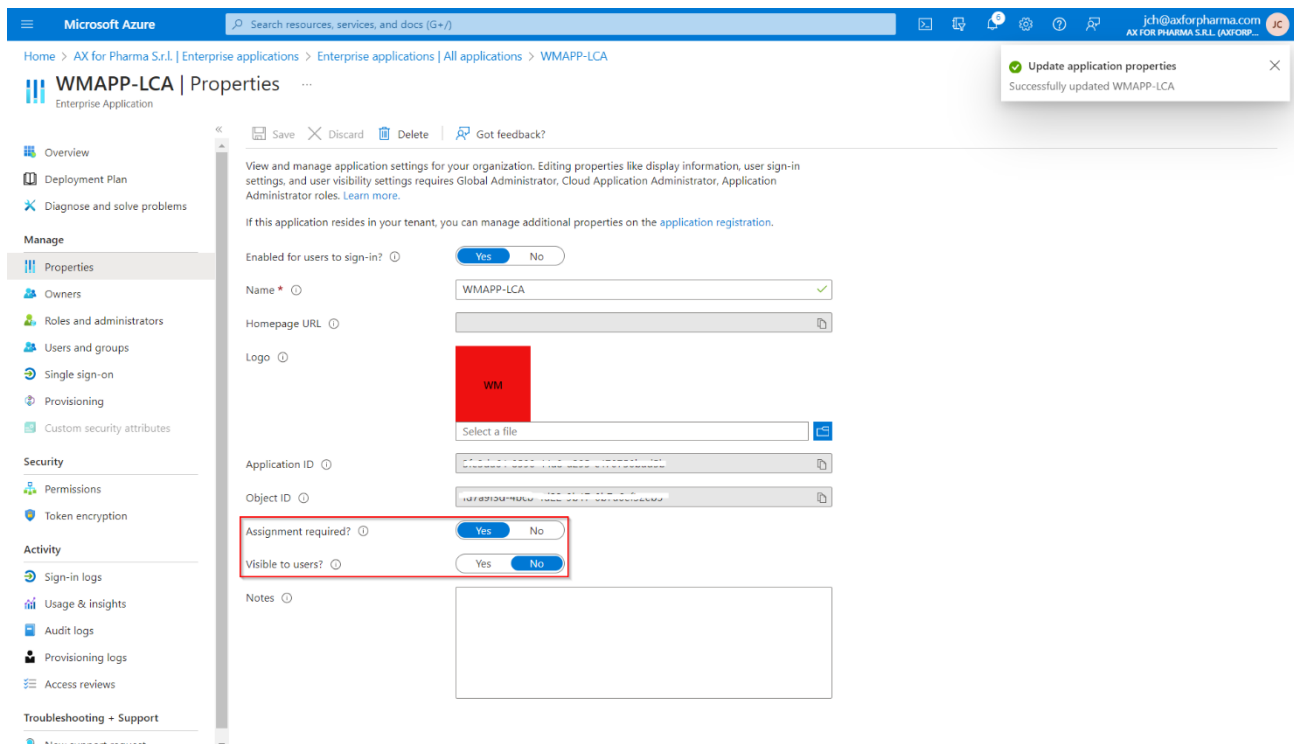


9. In the **Manage** list, select “API permissions”.
10. Click “Add a permission”.
11. In the **Request API permissions** dialog box, on the **Microsoft APIs** tab, select the **Dynamics ERP** tile and then the **Delegated permissions** tile. Under **CustomService**, select the **CustomService.FullAccess** checkbox. Finally, select **Add permissions** to save changes.





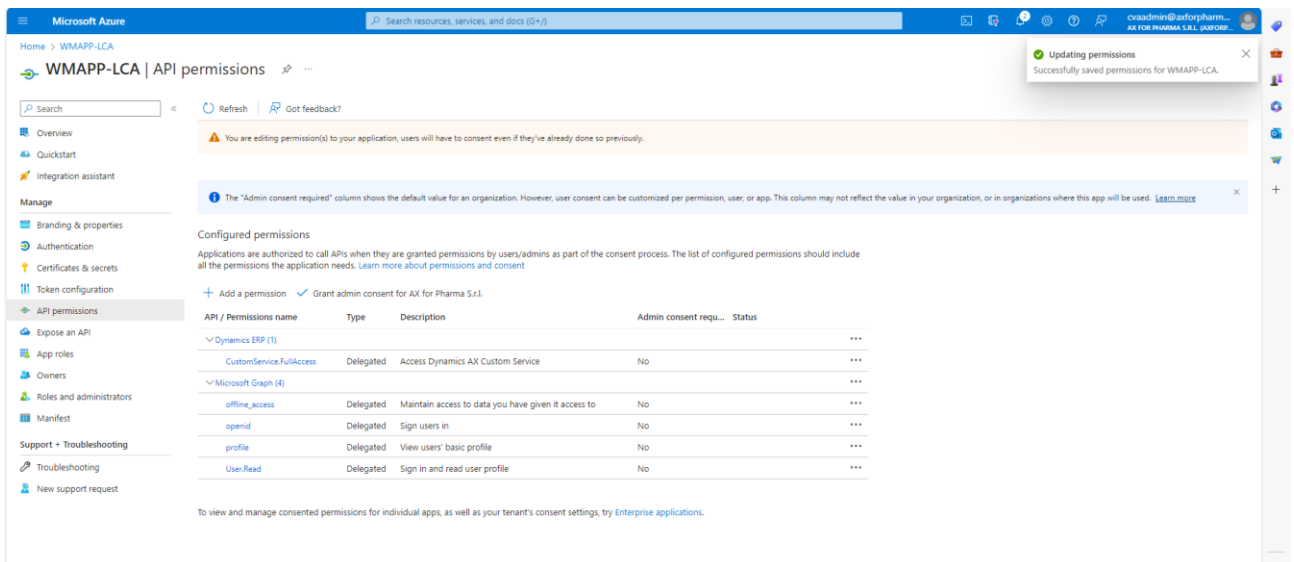
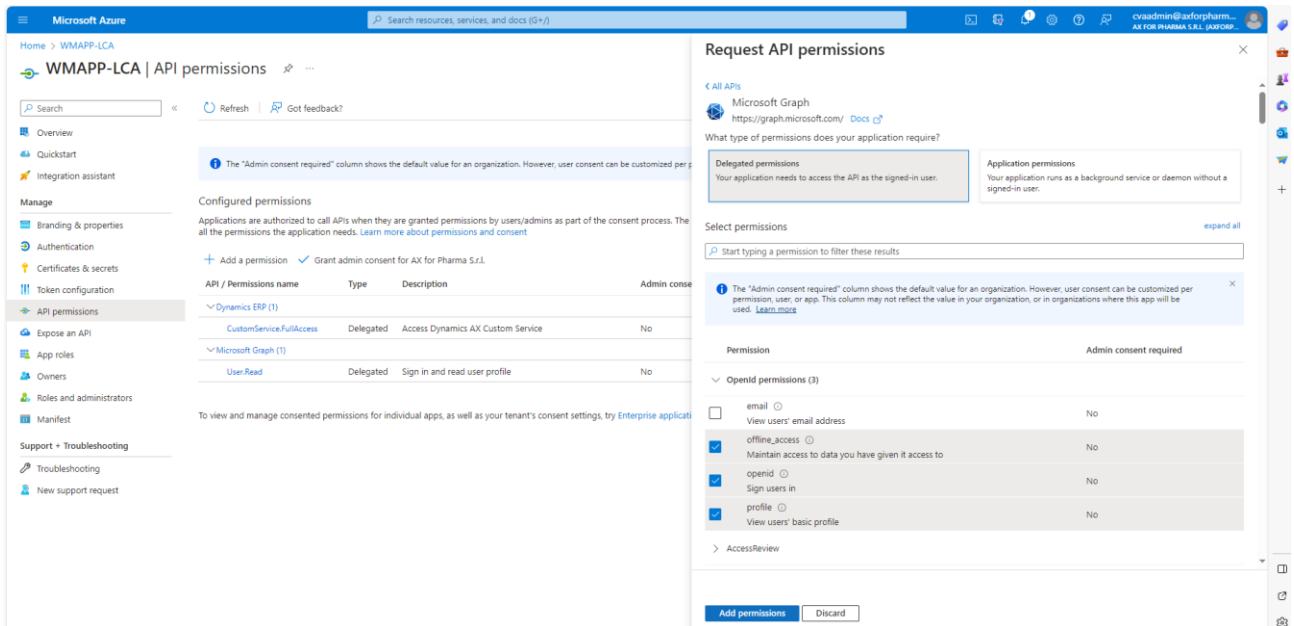
12. On the left navigation pane, click “Microsoft Entra ID”.
13. In the **Manage** list, click “Enterprise applications”. Then, in the new **Manage** list, select the **All applications** tab.
14. In the search form, enter the name that you entered for the app earlier in this procedure. Confirm that the **Application ID** value for the app that's found matches the client ID. Then select the link in the **Name** column to open the properties for the app.
15. In the **Manage** list, click “Properties”.
16. Set the **Assignment required?** option to **Yes** and the **Visible to users?** option to **No**. Then select **Save** on the toolbar.



17. In the **Manage** list, select **Users and groups**.
18. On the toolbar, select **Add user/group**.
19. On the **Add Assignment** page, select the link under the **Users** heading.
20. In the **Users** dialog box, select each user that you'll use to authenticate devices with Supply Chain Management.

3.3 Grant admin approval

1. Go to Microsoft Azure (link: <https://portal.azure.com>).
2. Click "Microsoft Entra ID" on the left.
3. In the **Manage** list, click "API permissions".
4. Select **Add a permission**.
5. In the **Request API permissions** dialog box, on the **Microsoft APIs** tab, select the **Microsoft Graph** tile and then the **Delegated permissions** tile.
Under **OpenId permissions**, select the **offline_access**, **openid**, **profile** checkboxes. Finally, select **Add permissions** to save your changes.



6. Grant admin consent for the organization

Home > WMAPP-LCA

WMAPP-LCA | API permissions

Search

Refresh Got feedback?

Grant admin consent confirmation.

Do you want to grant consent for the requested permissions for all accounts in AX for Pharma S.r.l.? This will update any existing admin consent records this application already has to match what is listed below.

Yes No

Applications are authorized to call APIs when they are granted permissions by users/admins as part of the consent process. The list of configured permissions should include all the permissions the application needs. [Learn more about permissions and consent](#)

+ Add a permission ✓ Grant admin consent for AX for Pharma S.r.l.

API / Permissions name	Type	Description	Admin consent requ...	Status
▼ Dynamics ERP (1)				
CustomService.FullAccess	Delegated	Access Dynamics AX Custom Service	No	...
▼ Microsoft Graph (4)				
offline_access	Delegated	Maintain access to data you have given it access to	No	...
openid	Delegated	Sign users in	No	...
profile	Delegated	View users' basic profile	No	...
User.Read	Delegated	Sign in and read user profile	No	...

To view and manage consented permissions for individual apps, as well as your tenant's consent settings, try [Enterprise applications](#).

offline_access

Microsoft Graph

Remove permission

https://graph.microsoft.com/offline_access

Admin consent required

No

Admin consent display name

Maintain access to data you have given it access to

Admin consent description

Allows the app to see and update the data you gave it access to, even when users are not currently using the app. This does not give the app any additional permissions.

User consent display name

Maintain access to data you have given it access to

User consent description

Allows the app to see and update the data you gave it access to, even when you are not currently using the app. This does not give the app any additional permissions.

Docs

7. Repeat for each API permission

Microsoft Azure

Home > WMAPP-LCA

WMAPP-LCA | API permissions

Search

Refresh Got feedback?

Successfully granted admin consent for the requested permissions.

The "Admin consent required" column shows the default value for an organization. However, user consent can be customized per permission, user, or app. This column may not reflect the value in your organization, or in organizations where this app will be used. [Learn more](#)

Configured permissions

Applications are authorized to call APIs when they are granted permissions by users/admins as part of the consent process. The list of configured permissions should include all the permissions the application needs. [Learn more about permissions and consent](#)

+ Add a permission ✓ Grant admin consent for AX for Pharma S.r.l.

API / Permissions name	Type	Description	Admin consent requ...	Status
▼ Dynamics ERP (1)				
CustomService.FullAccess	Delegated	Access Dynamics AX Custom Service	No	Granted for AX for Phar...
▼ Microsoft Graph (4)				
offline_access	Delegated	Maintain access to data you have given it access to	No	Granted for AX for Phar...
openid	Delegated	Sign users in	No	Granted for AX for Phar...
profile	Delegated	View users' basic profile	No	Granted for AX for Phar...
User.Read	Delegated	Sign in and read user profile	No	Granted for AX for Phar...

To view and manage consented permissions for individual apps, as well as your tenant's consent settings, try [Enterprise applications](#).

Microsoft Azure

Home > WMAPP-LCA

WMAPP-LCA | API permissions

Search

Refresh Got feedback?

Successfully granted admin consent for the requested permissions.

The "Admin consent required" column shows the default value for an organization. However, user consent can be customized per permission, user, or app. This column may not reflect the value in your organization, or in organizations where this app will be used. [Learn more](#)

Configured permissions

Applications are authorized to call APIs when they are granted permissions by users/admins as part of the consent process. The list of configured permissions should include all the permissions the application needs. [Learn more about permissions and consent](#)

+ Add a permission ✓ Grant admin consent for AX for Pharma S.r.l.

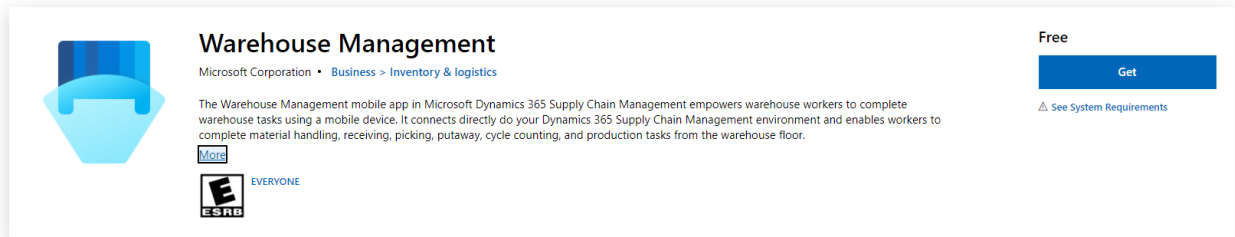
API / Permissions name	Type	Description	Admin consent requ...	Status
▼ Dynamics ERP (1)				
CustomService.FullAccess	Delegated	Access Dynamics AX Custom Service	No	Granted for AX for Phar...
▼ Microsoft Graph (4)				
offline_access	Delegated	Maintain access to data you have given it access to	No	Granted for AX for Phar...
openid	Delegated	Sign users in	No	Granted for AX for Phar...
profile	Delegated	View users' basic profile	No	Granted for AX for Phar...
User.Read	Delegated	Sign in and read user profile	No	Granted for AX for Phar...

To view and manage consented permissions for individual apps, as well as your tenant's consent settings, try [Enterprise applications](#).

3.4 Install and configure the Warehouse Management app

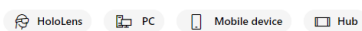
1. Download the "Warehouse Management" application from the Microsoft or Google Play store and run it.

Note: Disable automatic updates from the Microsoft or Google play store to ensure control of process changes.

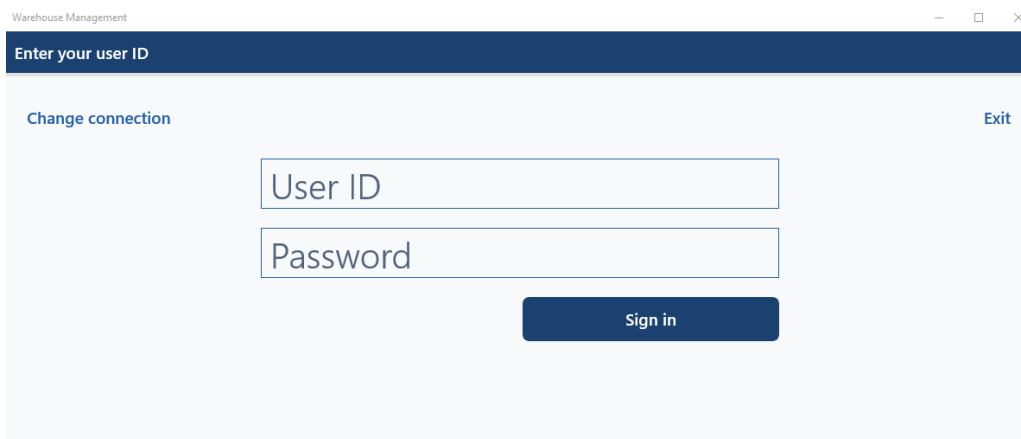


[Overview](#) [System Requirements](#) [Related](#)

Available on



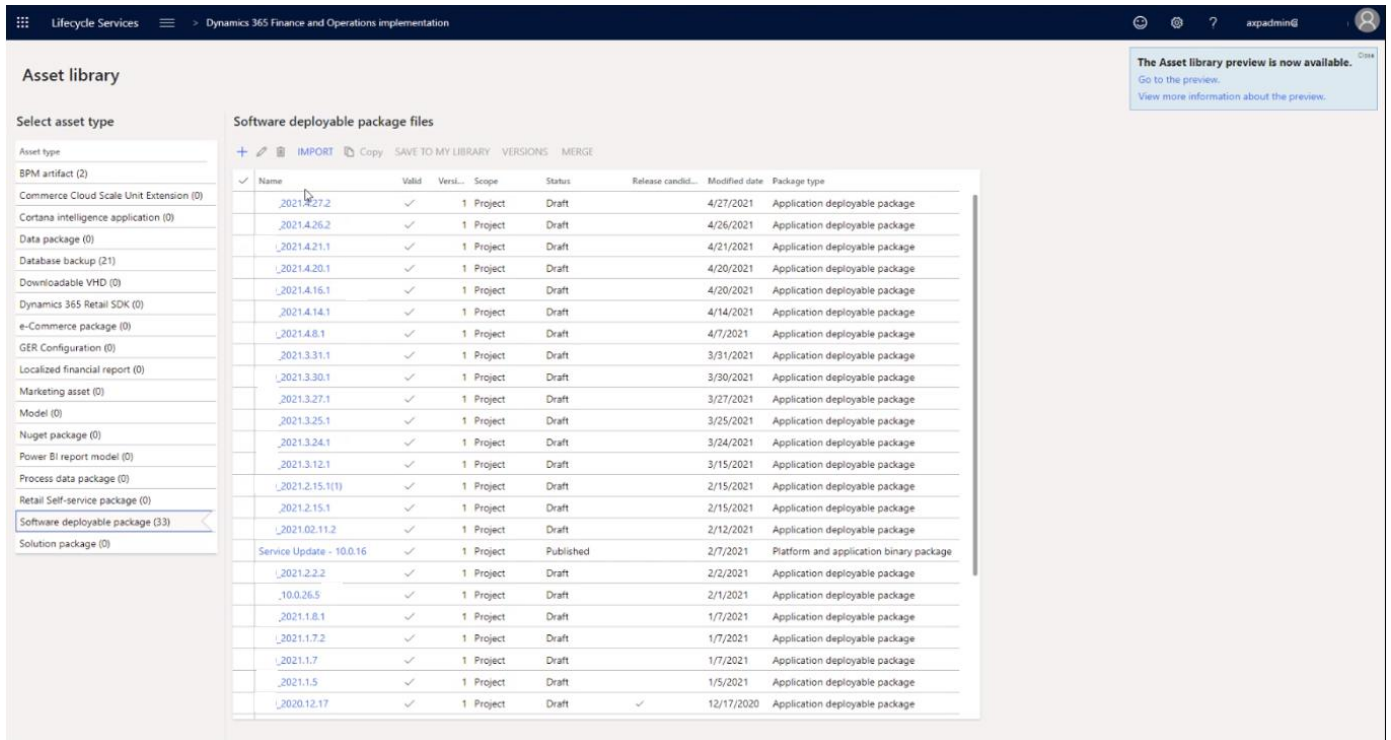
2. Connect the Warehouse Management app to the required Dynamics 365 environment by following Microsoft instructions:
 - a. Installation and configuration: [Install the Warehouse Management mobile app - Supply Chain Management | Dynamics 365 | Microsoft Learn](#)
 - b. Authentication method: [User-based authentication - Supply Chain Management | Dynamics 365 | Microsoft Learn](#)
3. The following app screen appears if everything has been set correctly.



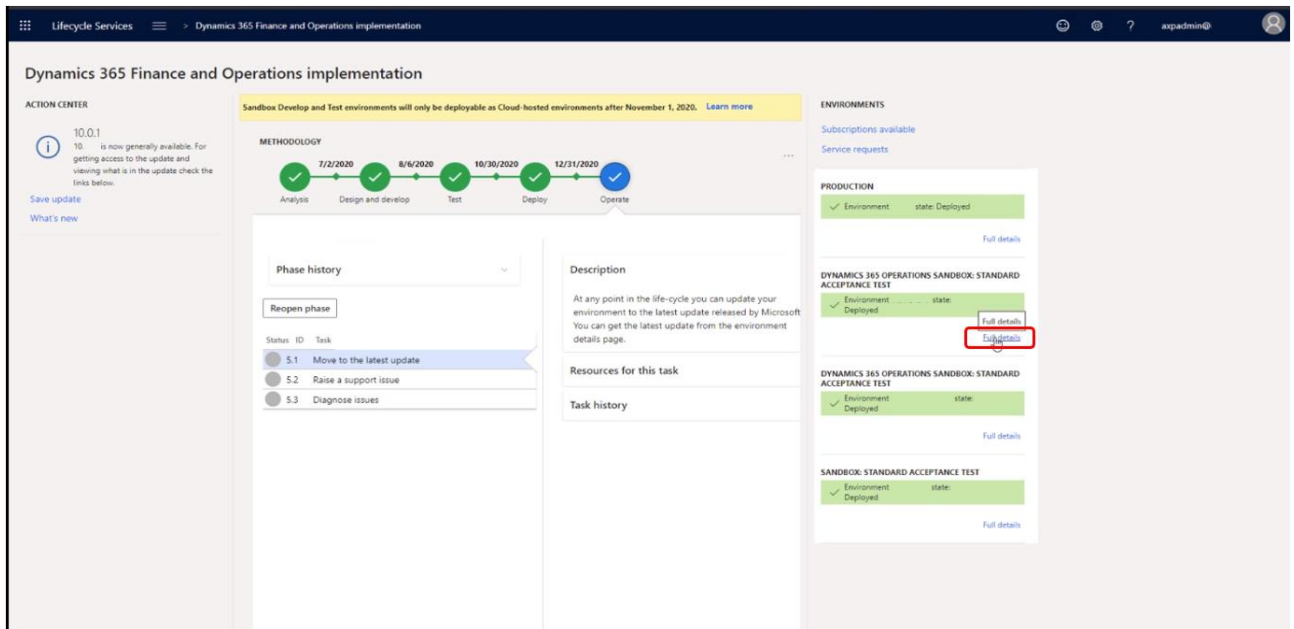
4. INSTALLATION OF THE LIFE SCIENCES SOLUTION COMPONENTS

4.1 Deployment of Life Sciences Solution in Tier 2

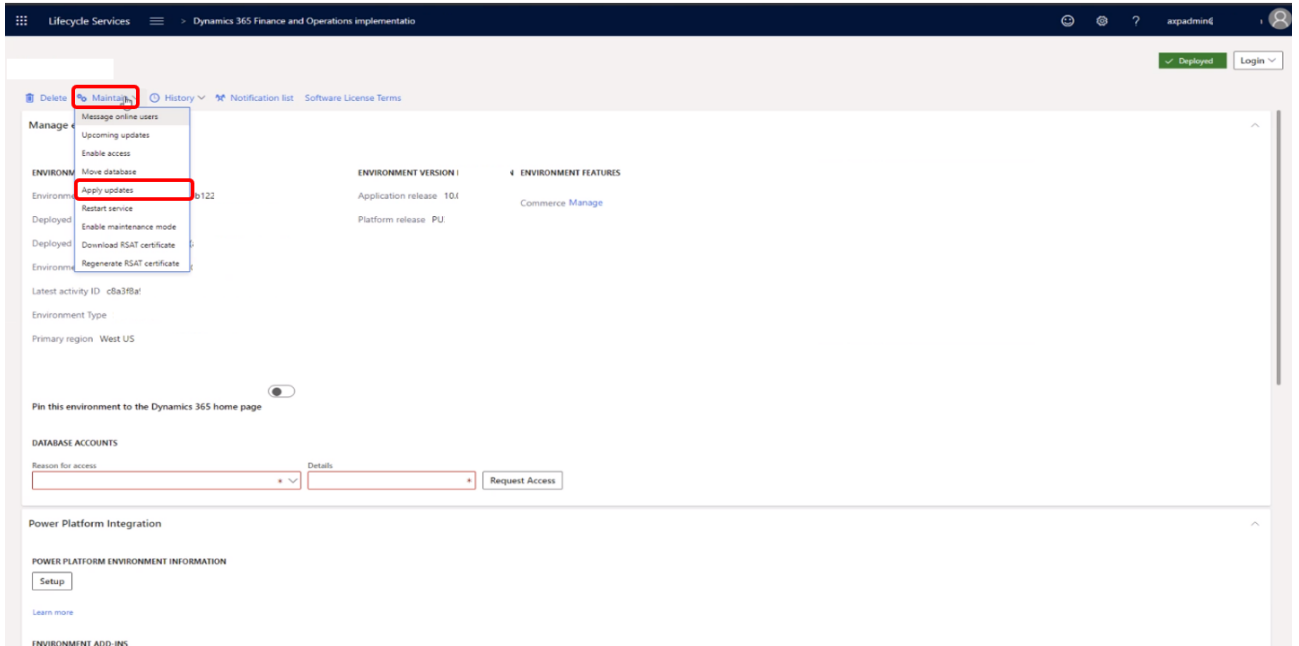
Assumption: The deployable package with licenses and all ISVs required are built and loaded in the asset library.



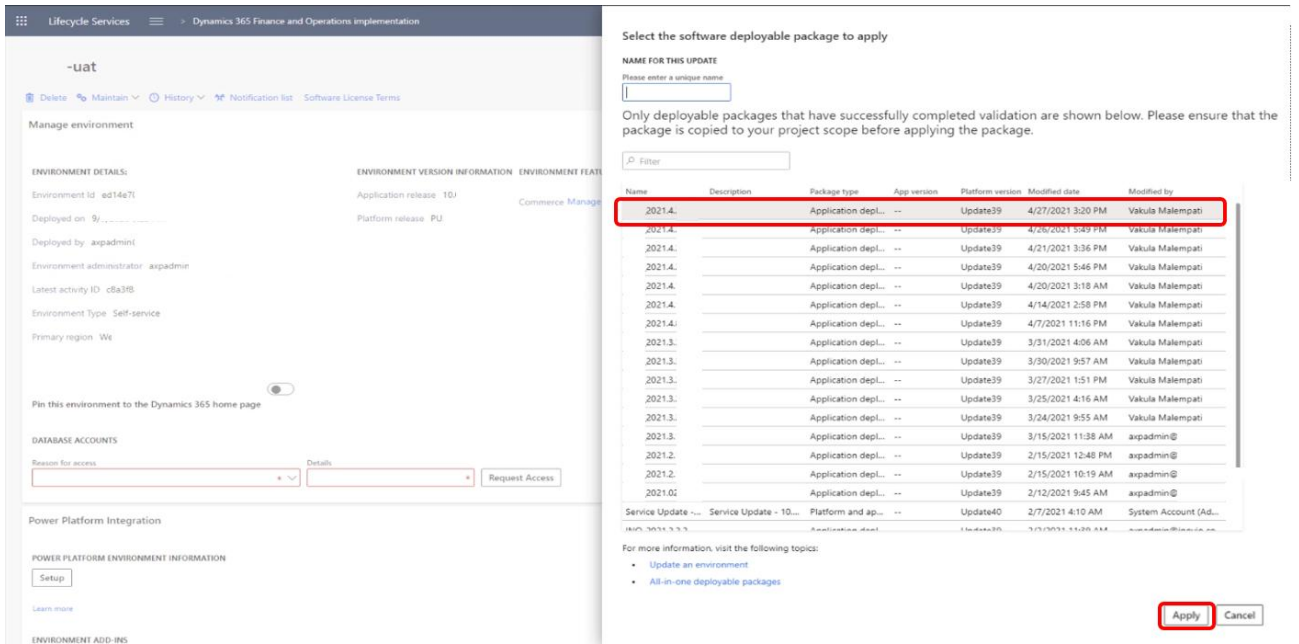
1. Select environment and click **Full details** in the LCS main page.



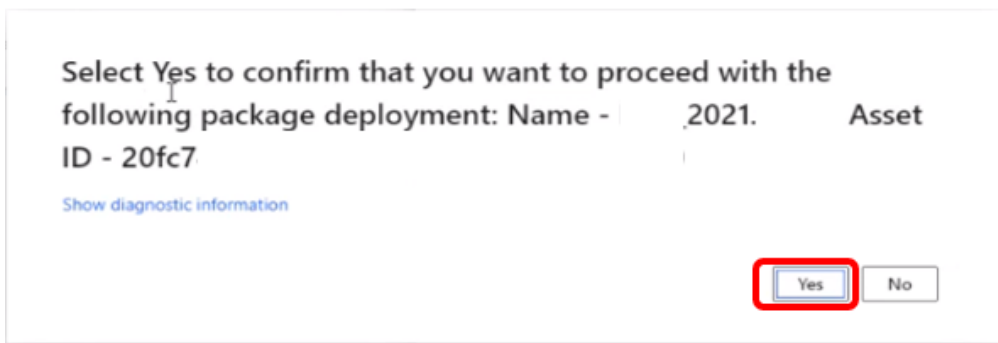
2. Click Maintain > Apply updates.



3. Enter the unique name of the deployable package in the text box and select the package from the list; hence click Apply.



4. Click Yes on the dialog box.

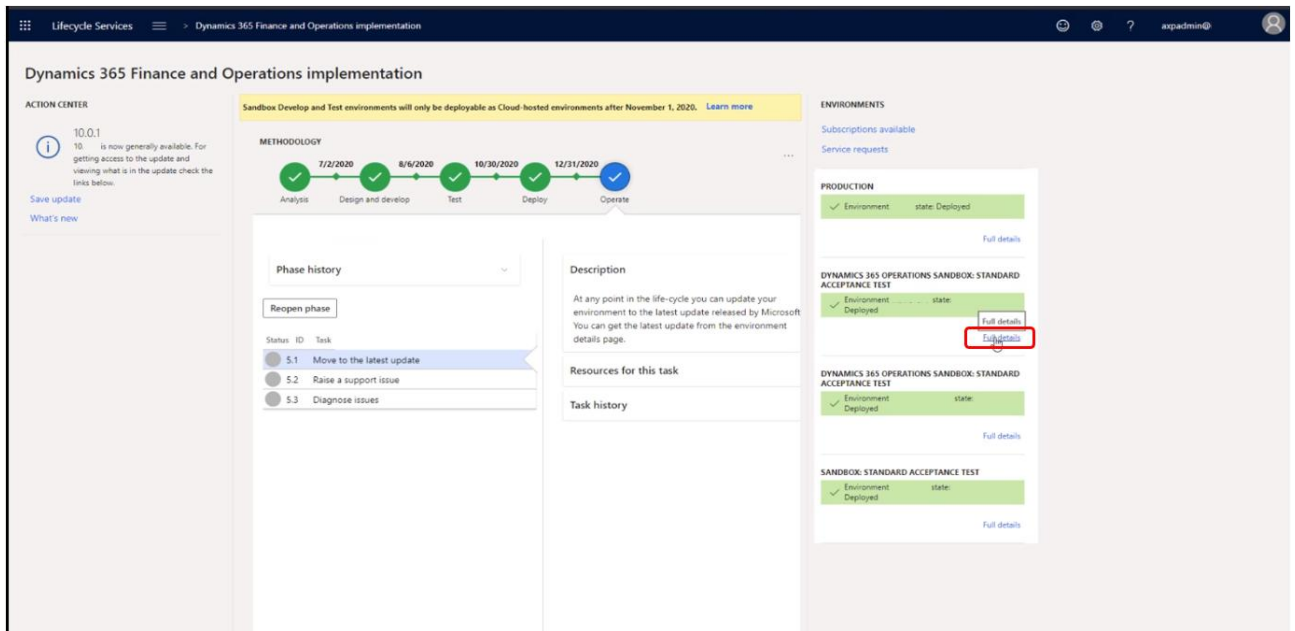


The system provides the status of the package deployment with a progress bar: an email is sent upon completion.

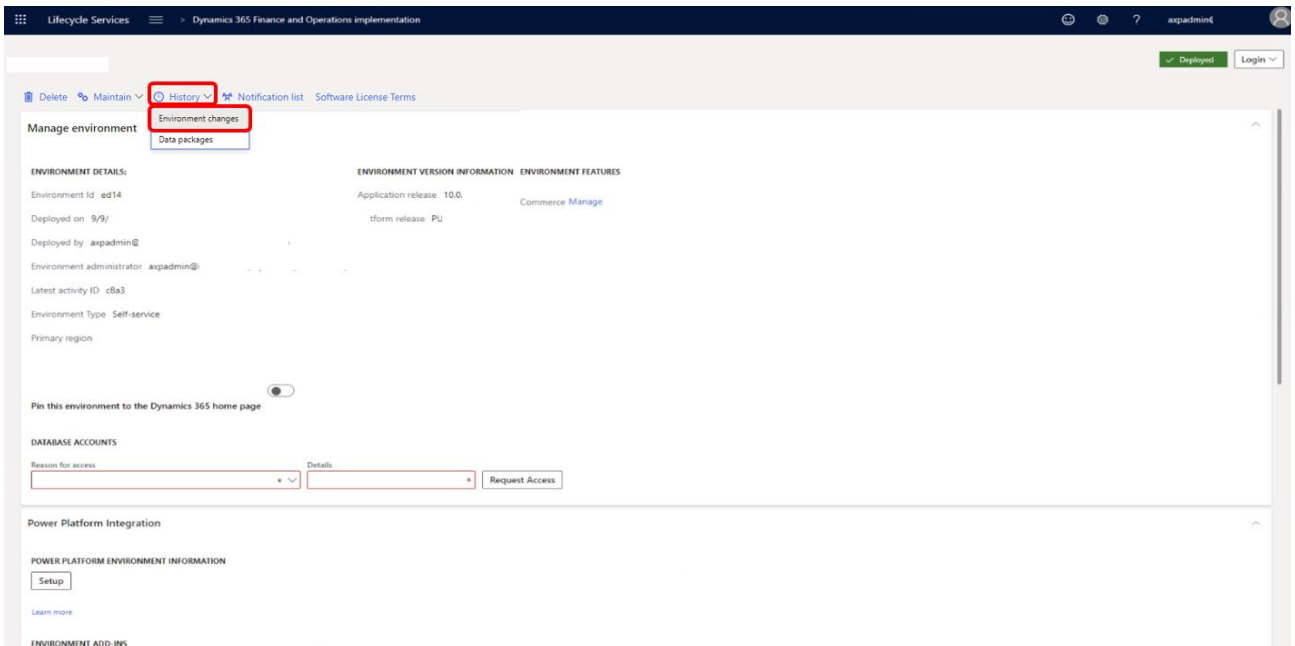
4.2 Deployment of Life Sciences Solution in the Production environment

Once the package is deployed, it needs to be applied to production. Hence, the package has to be marked as a release candidate in the official sandbox environment.

1. Select the environment and click Full details in LCS main page.



2. Click History > Environment changes.



3. Select the package applied.

Environment change history

Environment: -test
Organization name: [redacted]

* All times are displayed in your local time zone (currently UTC -05:00). Please be aware that other users will see the time localized into their time zones.

ENVIRONMENT ACTIVITY LOG

Name	Type	Start date	Completion date	Status
2021	Application deployment	4/20/2021 9:23 AM	4/20/2021 4:30 AM	Completed
2021.4.1	Application deployment	4/14/2021 5:49 PM	4/14/2021 6:39 PM	Completed
ish datab	Refresh database	4/3/2021 6:29 PM	4/3/2021 7:31 PM	Completed
2021.3.3	Application deployment	3/31/2021 4:12 AM	3/31/2021 5:17 AM	Completed
2021.3.3	Application deployment	3/30/2021 10:00 AM	3/30/2021 11:00 AM	Completed
2021.3.2	Application deployment	3/27/2021 2:25 PM	3/27/2021 3:08 PM	Completed
2021.3.2	Application deployment	3/25/2021 6:24 AM	3/25/2021 7:08 AM	Completed
rt datab	Export database	2/23/2021 2:10 PM	2/23/2021 2:34 PM	Completed
ish datab	Refresh database	2/12/2021 3:05 PM	2/12/2021 4:03 PM	Completed
2021.2.2	Application deployment	2/11/2021 9:41 AM	2/11/2021 10:30 AM	Completed
ce Updat	Platform and application	2/11/2021 8:36 AM	2/11/2021 9:26 AM	Completed
ish datab	Refresh database	1/13/2021 6:12 PM	1/13/2021 7:23 PM	Completed
2021.1.8	Application deployment	1/12/2021 8:59 PM	1/12/2021 9:51 PM	Completed
t-in-time	Point-in-time res...	1/8/2021 9:40 AM	1/8/2021 11:23 AM	Completed
t-in-time	Point-in-time res...	1/4/2021 8:35 AM	1/4/2021 9:43 AM	Completed
ish datab	Refresh database	12/29/2020 2:21 PM	12/29/2020 3:22 PM	Completed
rt datab	Export database	12/29/2020 1:40 PM	12/29/2020 2:02 PM	Completed
2020.12.	Application deployment	12/17/2020 10:51 PM	12/17/2020 11:31 PM	Completed
Export database	Export database	12/10/2020 8:47 AM	12/10/2020 9:12 AM	Completed
Export database	Export database	11/19/2020 8:45 AM	11/19/2020 9:07 AM	Completed

Update Details:

Update Type: [redacted] Created by: [redacted] Is Release Candidate: No

Application deployable package: No

Application Release: [redacted] Application Version: 10.0.6 Microsoft update: No

Activity ID: ff67e Status: Completed Completion time: 1 hours : 6 minutes

Deployable Package Details:

Customization Package: 1_2021.4.16.1 Asset ID: b2

Description: [redacted]

4. Click Mark as release candidate. The value in the Is Release Candidate field changes to "Yes".

Environment change history

Environment: -test
Organization name: [redacted]

* All times are displayed in your local time zone (currently UTC -05:00). Please be aware that other users will see the time localized into their time zones.

ENVIRONMENT ACTIVITY LOG

Name	Type	Start date	Completion date	Status
2021	Application deployment	4/20/2021 9:23 AM	4/20/2021 4:30 AM	Completed
2021.4.1	Application deployment	4/14/2021 5:49 PM	4/14/2021 6:39 PM	Completed
ish datab	Refresh database	4/3/2021 6:29 PM	4/3/2021 7:31 PM	Completed
2021.3.3	Application deployment	3/31/2021 4:12 AM	3/31/2021 5:17 AM	Completed
2021.3.3	Application deployment	3/30/2021 10:00 AM	3/30/2021 11:00 AM	Completed
2021.3.2	Application deployment	3/27/2021 2:25 PM	3/27/2021 3:08 PM	Completed
2021.3.2	Application deployment	3/25/2021 6:24 AM	3/25/2021 7:08 AM	Completed
rt datab	Export database	2/23/2021 2:10 PM	2/23/2021 2:34 PM	Completed
ish datab	Refresh database	2/12/2021 3:05 PM	2/12/2021 4:03 PM	Completed
2021.2.2	Application deployment	2/11/2021 9:41 AM	2/11/2021 10:30 AM	Completed
ce Updat	Platform and application	2/11/2021 8:36 AM	2/11/2021 9:26 AM	Completed
ish datab	Refresh database	1/13/2021 6:12 PM	1/13/2021 7:23 PM	Completed
2021.1.8	Application deployment	1/12/2021 8:59 PM	1/12/2021 9:51 PM	Completed
t-in-time	Point-in-time res...	1/8/2021 9:40 AM	1/8/2021 11:23 AM	Completed
t-in-time	Point-in-time res...	1/4/2021 8:35 AM	1/4/2021 9:43 AM	Completed
ish datab	Refresh database	12/29/2020 2:21 PM	12/29/2020 3:22 PM	Completed
rt datab	Export database	12/29/2020 1:40 PM	12/29/2020 2:02 PM	Completed
2020.12.	Application deployment	12/17/2020 10:51 PM	12/17/2020 11:31 PM	Completed
Export database	Export database	12/10/2020 8:47 AM	12/10/2020 9:12 AM	Completed
Export database	Export database	11/19/2020 8:45 AM	11/19/2020 9:07 AM	Completed

Update Details:

Update Type: [redacted] Created by: [redacted] Is Release Candidate: Yes

Application deployable package: No

Application Release: [redacted] Application Version: 10.0.6 Microsoft update: No

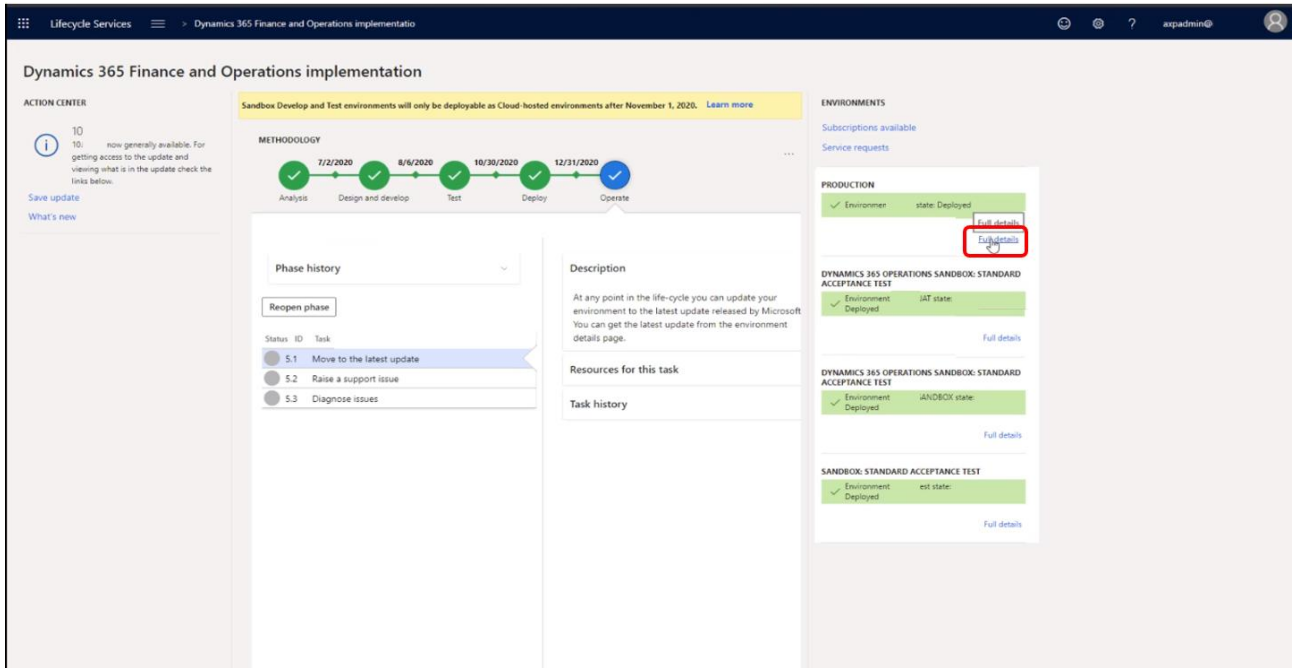
Activity ID: ff67e Status: Completed Completion time: 1 hours : 6 minutes

Deployable Package Details:

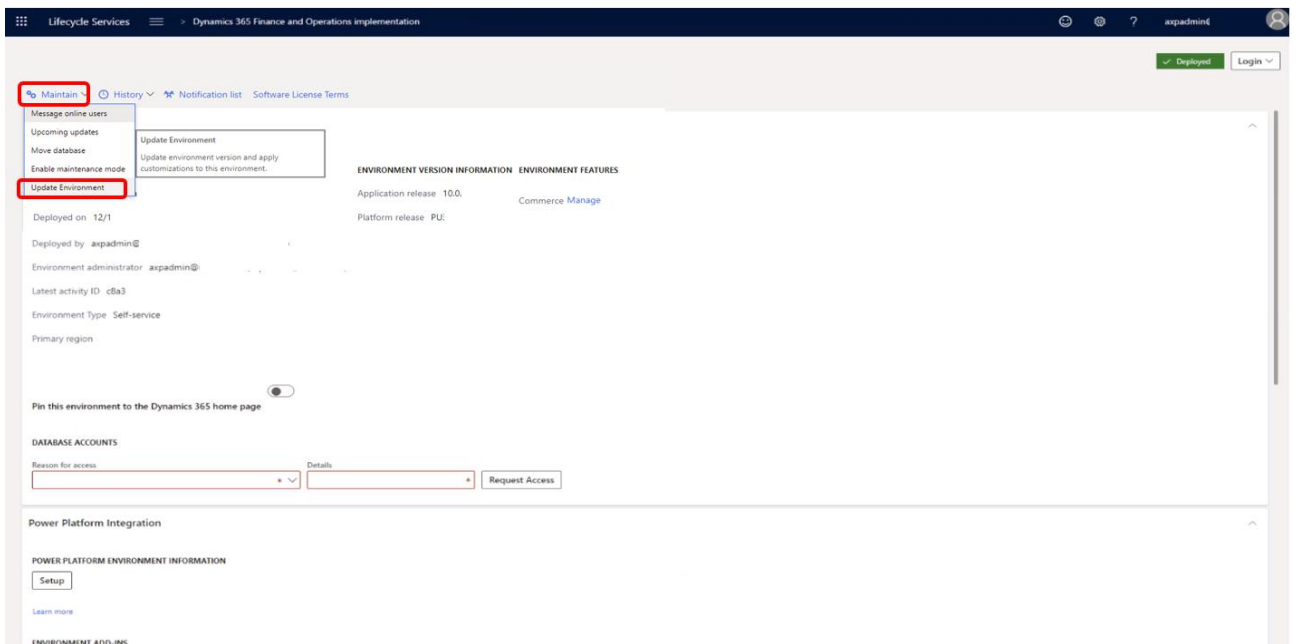
Customization Package: 1_2021.4.16.1 Asset ID: b2

Description: [redacted]

5. Go back to the LCS main page and select the production environment and click Full details.



6. Click Maintain > Update environment.



7. Select the sandbox environment from the dropdown menu.

Manage environment

ENVIRONMENT DETAILS:
 Environment Id: 551c1
 Deployed on: 12/
 Deployed by:
 Environment administrator: aspadmin
 Latest activity ID: c1b
 Environment Type: Self-service
 Primary region: We

ENVIRONMENT VERSION INFORMATION:
 Application release: 10.0
 Platform release: PU3

ENVIRONMENT FEATURES:
 Commerce Manage

Power Platform Integration

POWER PLATFORM ENVIRONMENT INFORMATION
 Setup

ENVIRONMENT ADD-INS
 Power platform environment must be setup to install add-ins.

Available updates

Select the sandbox snapshot to apply

AVAILABLE SANDBOXES
 Select a sandbox environment.

Name	Application Release	Application Version	Customization
Select an available sandbox environment from the list above. After you make a selection, you need to ensure that an environment update in that sandbox environment has been marked as a release candidate on the Environment History page. This sandbox snapshot contains both the base product and the customization. Therefore, both will be moved over when the selected update is applied to the production environment.			

*Only updates that are marked as a release candidate on the sandbox environment's Environment History page are shown here. If the file asset corresponding to the update is deleted it will not show up here.

Downtime start: 4/30/2021 09:26:06 AM

Downtime end: 4/30/2021 12:26:06 PM

* All times are displayed in your local time zone (currently UTC -05:00). Please be aware that other users will see the time localized into their time zones.

For more information, visit the following topics:

- Update an environment
- All-in-one deployable packages

Schedule Cancel

8. Select the deployable package.

Manage environment

ENVIRONMENT DETAILS:
 Environment Id: 551c1
 Deployed on:
 Deployed by:
 Environment administrator: aspadmin@ir
 Latest activity ID: c1b2c1
 Environment Type: Self-service
 Primary region: We

ENVIRONMENT VERSION INFORMATION:
 Application release: 10.0
 Platform release: PU3

ENVIRONMENT FEATURES:
 Commerce Manage

Power Platform Integration

POWER PLATFORM ENVIRONMENT INFORMATION
 Setup

ENVIRONMENT ADD-INS
 Power platform environment must be setup to install add-ins.

Available updates

Select the sandbox snapshot to apply

AVAILABLE SANDBOXES
 Select a sandbox environment.
 test (6a3f)

Name	Application Release	Application Version	Customization
2021.		10.0.6	_20
_2021.2	10.0.	10.0.4	_2021.2.
ice Upc - Ver...	10.0.	10.0.4	ce Upd
_2021.1	10.0.	10.0.1	_2021.1.
_2020.1	10.0.	10.0.1	_2020.1.
_2020.1	10.0.	10.0.1	_2020.11

*Only updates that are marked as a release candidate on the sandbox environment's Environment History page are shown here. If the file asset corresponding to the update is deleted it will not show up here.

Downtime start: 4/30/2021 09:26:06 AM

Downtime end: 4/30/2021 12:26:06 PM

* All times are displayed in your local time zone (currently UTC -05:00). Please be aware that other users will see the time localized into their time zones.

For more information, visit the following topics:

- Update an environment
- All-in-one deployable packages

Schedule Cancel

9. Select a specific downtime start and click Schedule.

Lifecycle Services > Dynamics 365 Finance and Operations implementation

Maintain History Notification list Software License Terms

Manage environment

ENVIRONMENT DETAILS:

Environment id: 551cf

Deployed on:

Deployed by:

Environment administrator: aspadmin@ir

Latest activity ID: c1b2cf

Environment type: Self-service

Primary region: Wt

Pin this environment to the Dynamics 365 home page

ENVIRONMENT VERSION INFORMATION

Application release: 10.0

Platform release: PU3⁹

ENVIRONMENT FEATURES

Commerce Manage

Power Platform Integration

POWER PLATFORM ENVIRONMENT INFORMATION

[Setup](#)

[Learn more](#)

ENVIRONMENT ADD-INS

Power platform environment must be setup to install add-ins.

Available updates

Select the sandbox snapshot to apply

AVAILABLE SANDBOXES

Select a sandbox environment.

test (6a3f)

Name	Application Release	Application Version	Customization
2021.		10.0.6	_20
_2021.2	10.0	10.0.4	_2021.2.
Ice Upc - Ver...	10.0	10.0.4	ce Upd
_2021.1	10.0	10.0.1	_2021.1.
_2020.1	10.0	10.0.1	_2020.1.
_2020.1	10.0	10.0.1	_2020.1i

*Only updates that are marked as a release candidate on the sandbox environment's Environment History page are shown here. If the file asset corresponding to the update is deleted it will not show up here.

Downtime start: 4/30/2021 09:26:05 AM

Downtime end: 4/30/2021 12:26:06 PM

* All times are displayed in your local time zone (currently UTC -05:00). Please be aware that other users will see the time localized into their time zones.

For more information, visit the following topics:

- Update an environment
- All-in-one deployable packages

[Schedule](#) [Cancel](#)

5. SETUP GUIDE FOR LABELING INTEGRATION TO ON-PREMISE MACHINE USING FILE DROP METHODOLOGY

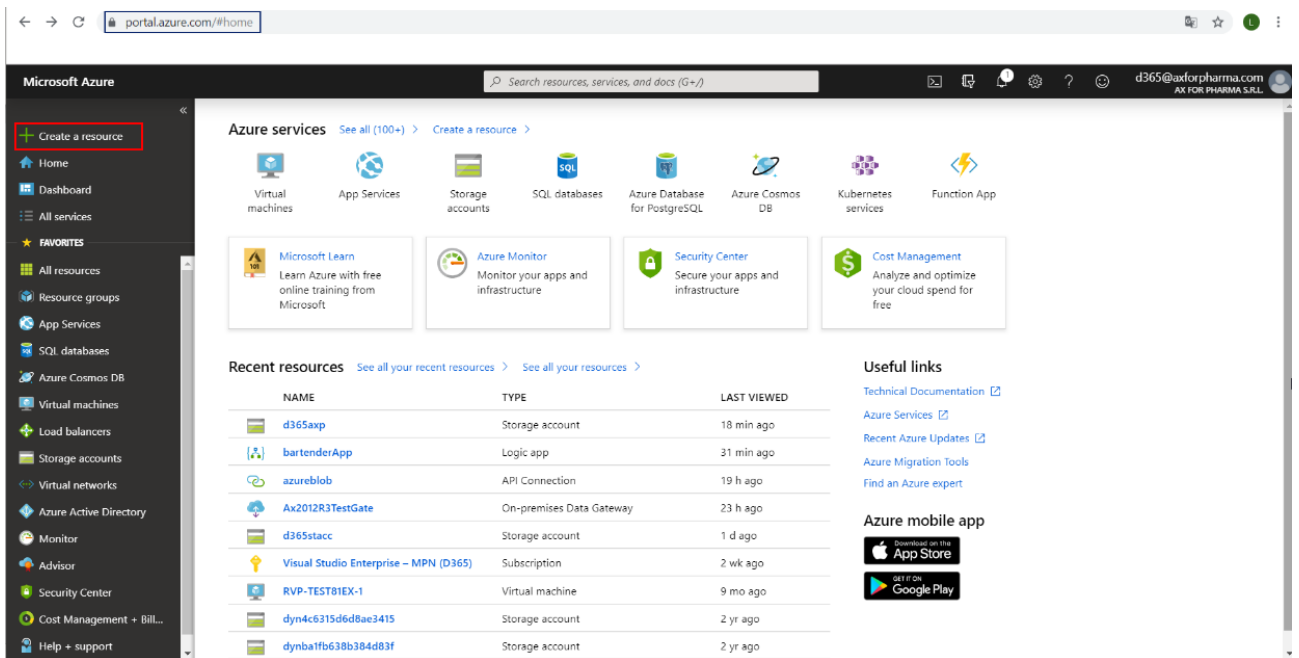
This setup guide applies when choosing to integrate Dynamics 365 and Life Sciences Solution and third party label printing solution using file drop method (i.e. the system generates a label file and drops in a file folder for the third party label printing solution to run print command).

5.1 Create storage account

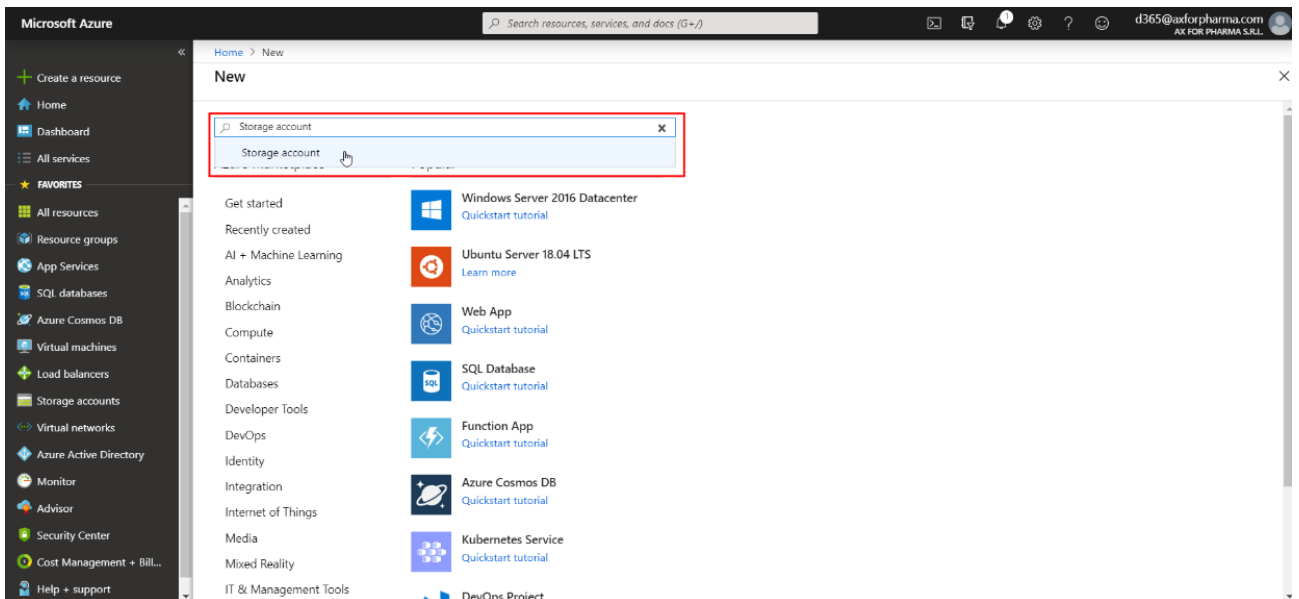
5.1.1 Create storage account

Go to the Microsoft Azure site: <https://portal.azure.com/#home>.

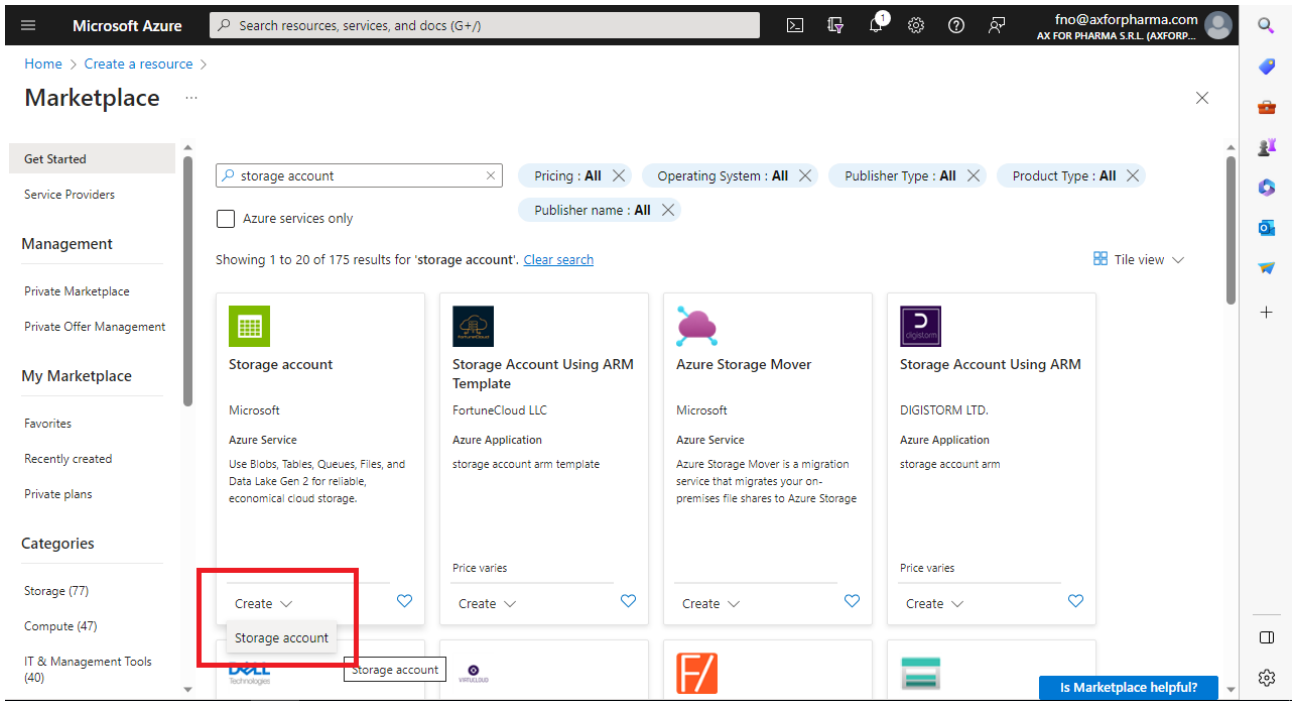
1. Log in and select "Create a resource".



2. Search and select Storage account.



3. Click "Create" > "Storage account" to confirm creation.



4. In the "Create storage account" page, fill in the following fields:

- a. **Subscription:** verify that the pre-selected value is correct;
- b. **Resource group:** it is possible to either choose an existing one or write a name that the system is assigned to a new resource group created automatically;
- c. **Storage account name:** it must be different from all the other existing storage accounts' names;
- d. **Region:** the region where the account should be created.
Note: it is recommended to choose the region closest to the on-premises machine and to maintain the same choice for the next steps of this process.
- e. **Performance:** Determine whether you want to have premium performance for block blobs, file shares, or page blobs in your storage account.
- f. **Redundancy:** Choose a replication strategy that matches your durability requirements. Some settings can't be changed after the storage account is created.

5. Then click "Review".

Microsoft Azure Search resources, services, and docs (G+)

Home > Create a resource > Marketplace

Create a storage account

Basics Advanced Networking Data protection Encryption Tags Review

Subscription * Visual Studio Enterprise Subscription – MPN (msdn12)

Resource group * (New) BackupVaultCleanupResourceGroup
Create new

Instance details

Storage account name * bartenderstorageaccount2

Region * (Europe) West Europe
Deploy to an edge zone

Performance * Standard: Recommended for most scenarios (general-purpose v2 account)
 Premium: Recommended for scenarios that require low latency.

Review < Previous Next : Advanced > Give feedback

6. Click "Create" to confirm creation.

Microsoft Azure Search resources, services, and docs (G+)

Home > Create a resource > Marketplace

Create a storage account

Basics Advanced Networking Data protection Encryption Tags Review

Basics

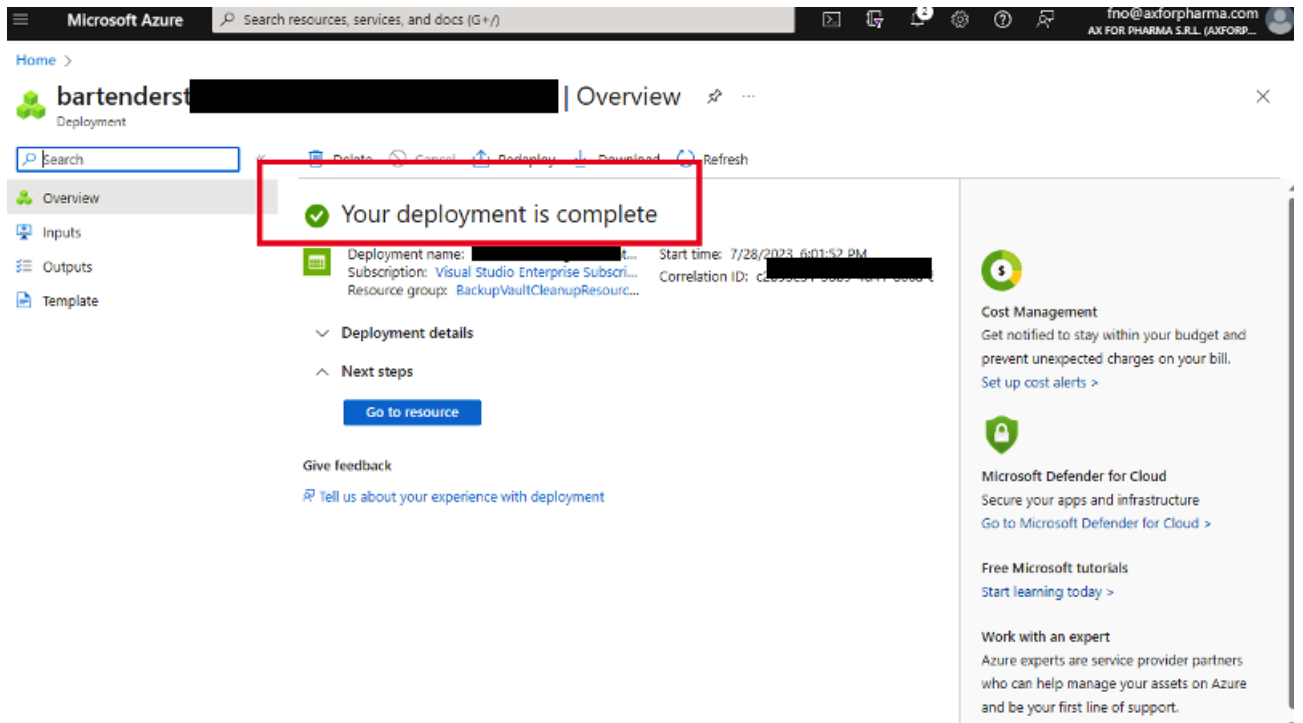
Subscription	Visual Studio Enterprise Subscription – MPN (msdn12)
Resource Group	BackupVaultCleanupResourceGroup
Location	westeurope
Storage account name	bartenderstorageaccount2
Deployment model	Resource manager
Performance	Standard
Replication	Read-access geo-redundant storage (RA-GRS)

Advanced

Enable hierarchical namespace	Disabled
Enable network file system v3	Disabled
Allow cross-tenant replication	Enabled
Access tier	Hot

Create < Previous Next > Download a template for automation Give feedback

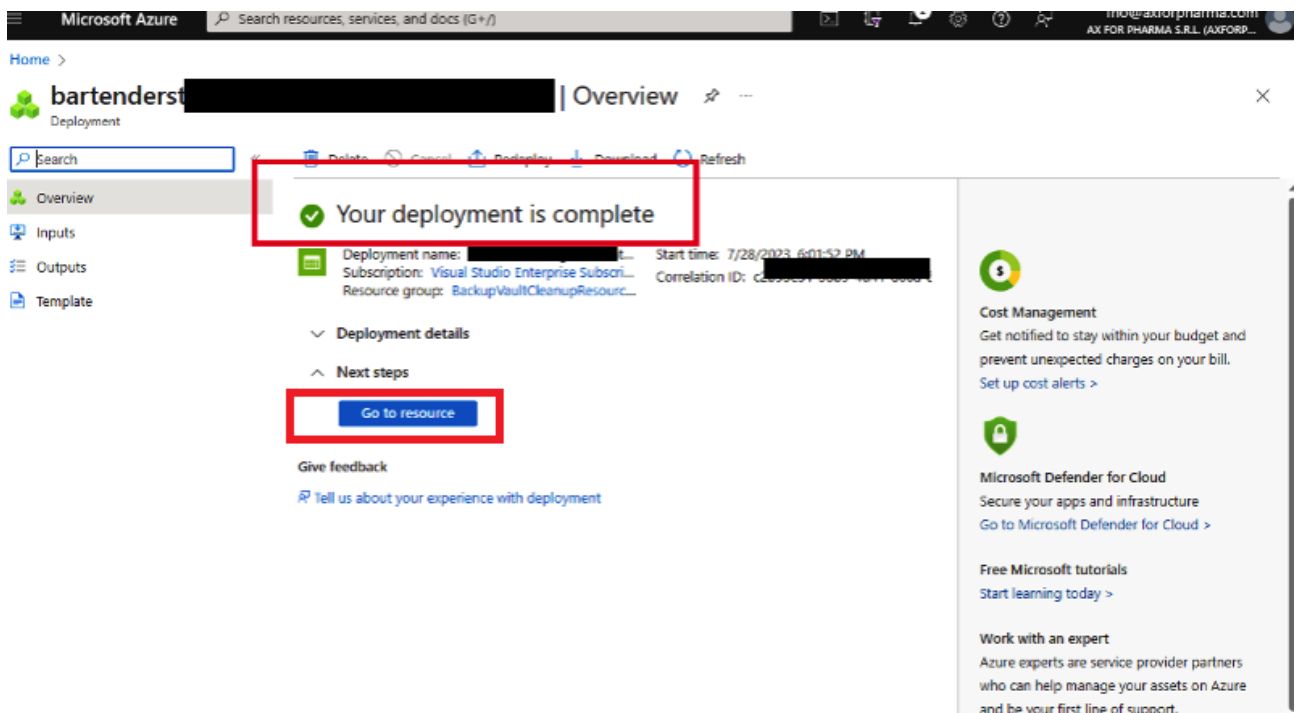
7. Wait until deployment is completed.



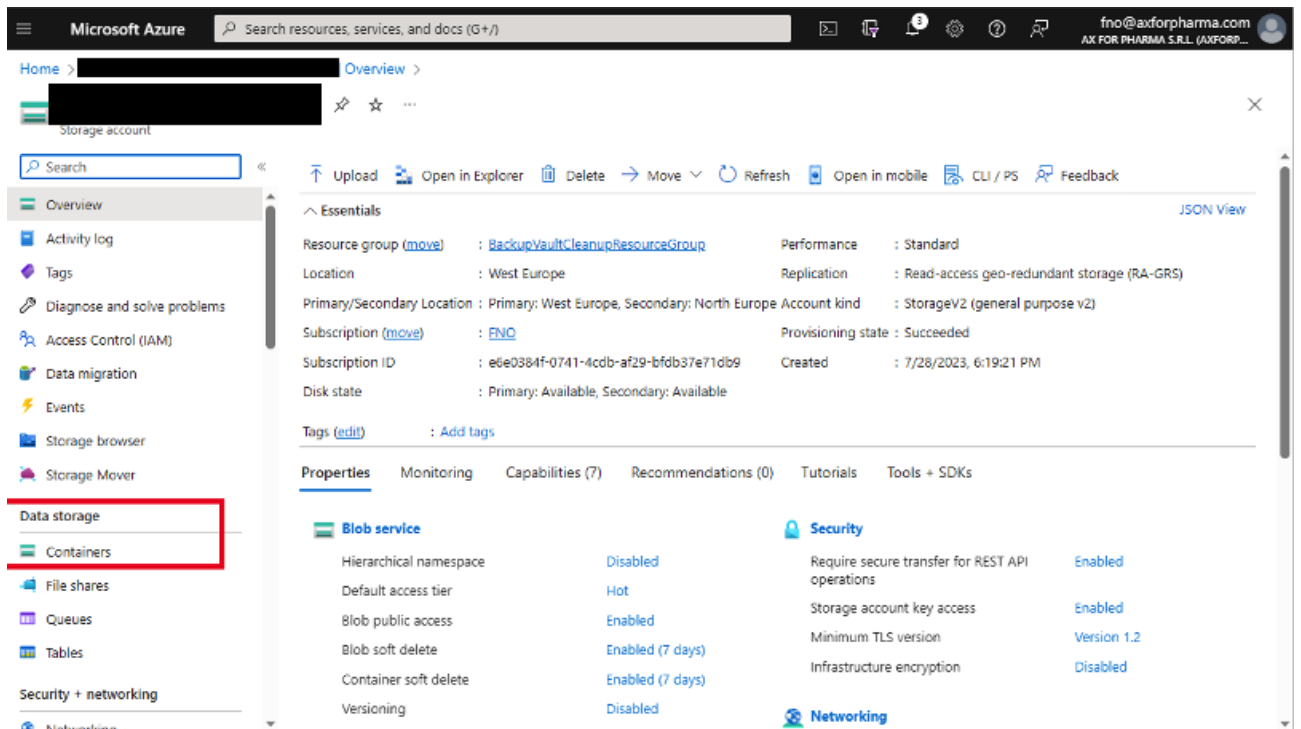
NOTE: For each instance of the label printing software, it is necessary to configure one Azure storage. It is possible to associate multiple environments to the same Azure storage.

5.1.2 Create container

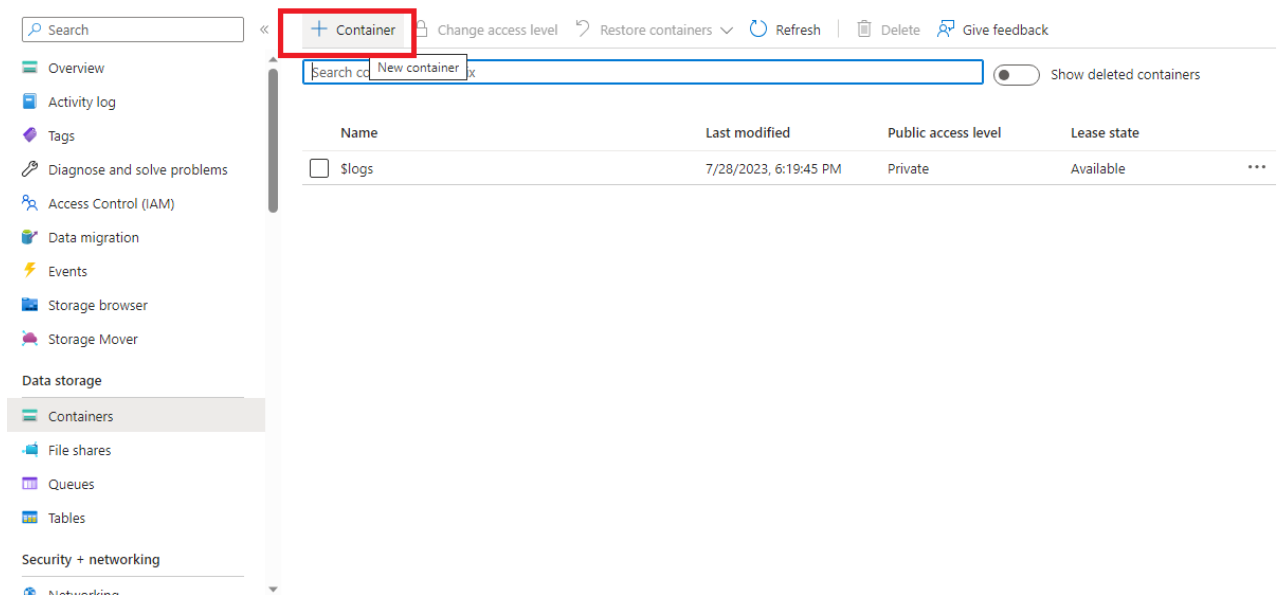
1. Click "Go to resource".



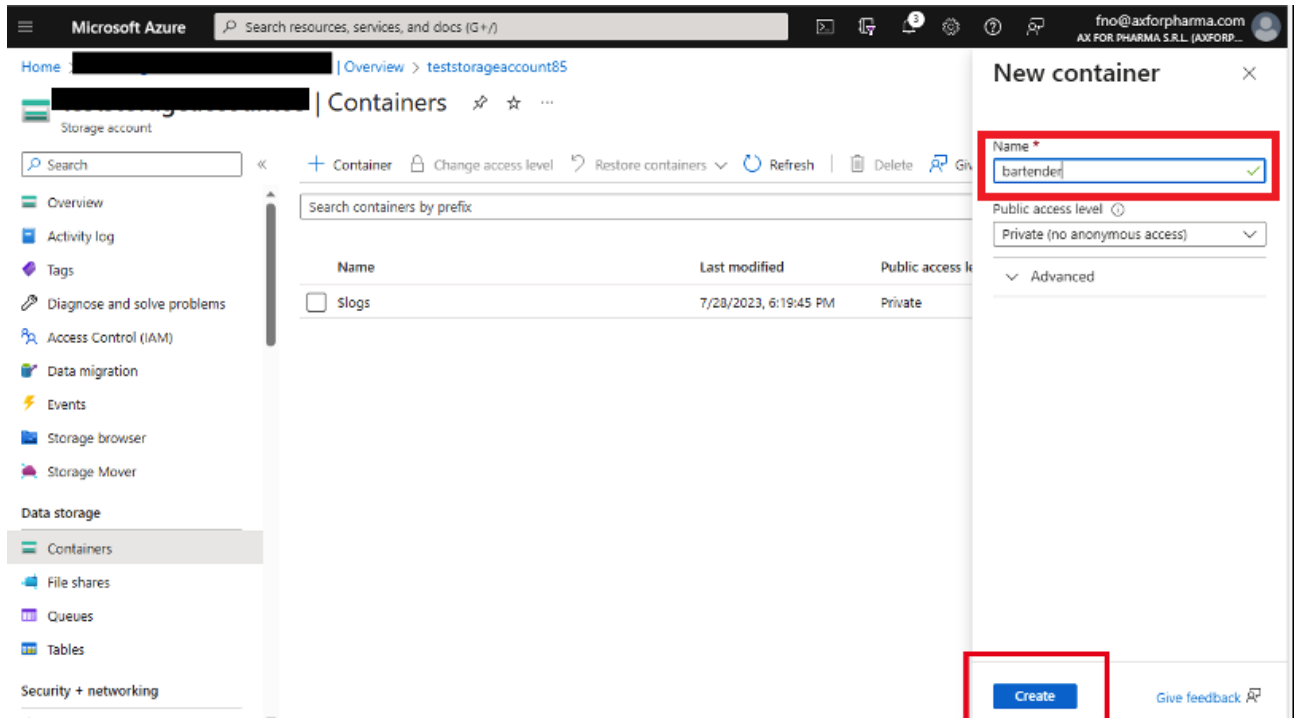
2. Under "Data storage", click "Containers".



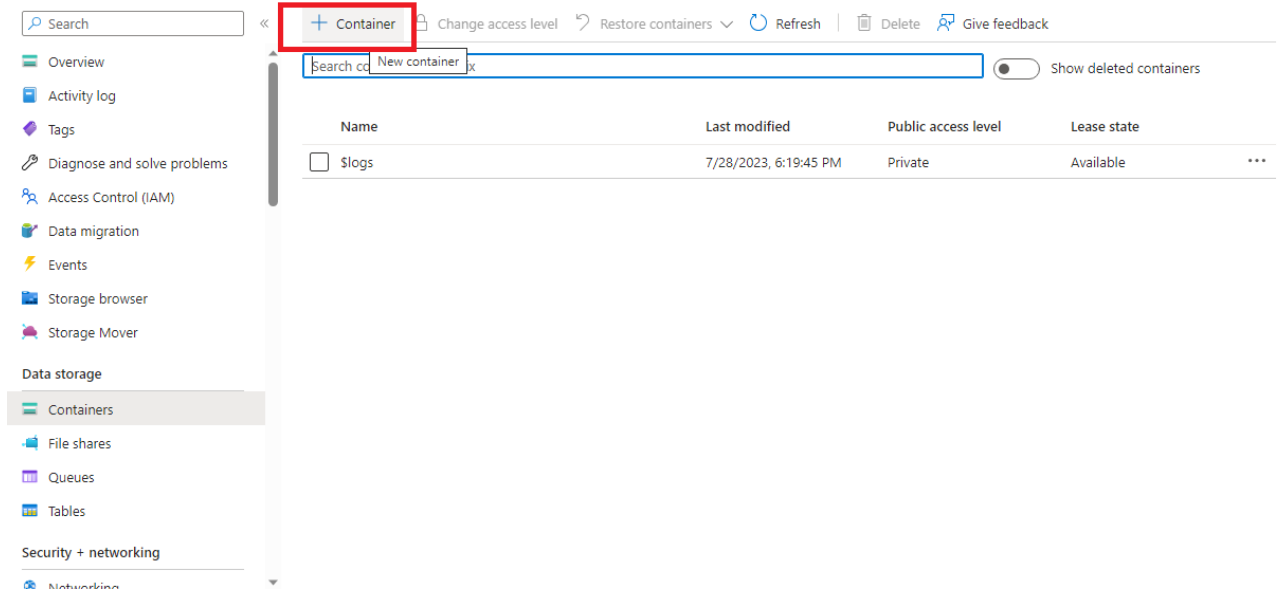
3. Click "+ Container".



4. Enter the name for the container in the Name field and confirm by clicking "Create". This is the repository in Azure that includes all the files exported from Dynamics 365 that have not yet been exported to the on-premises folder.

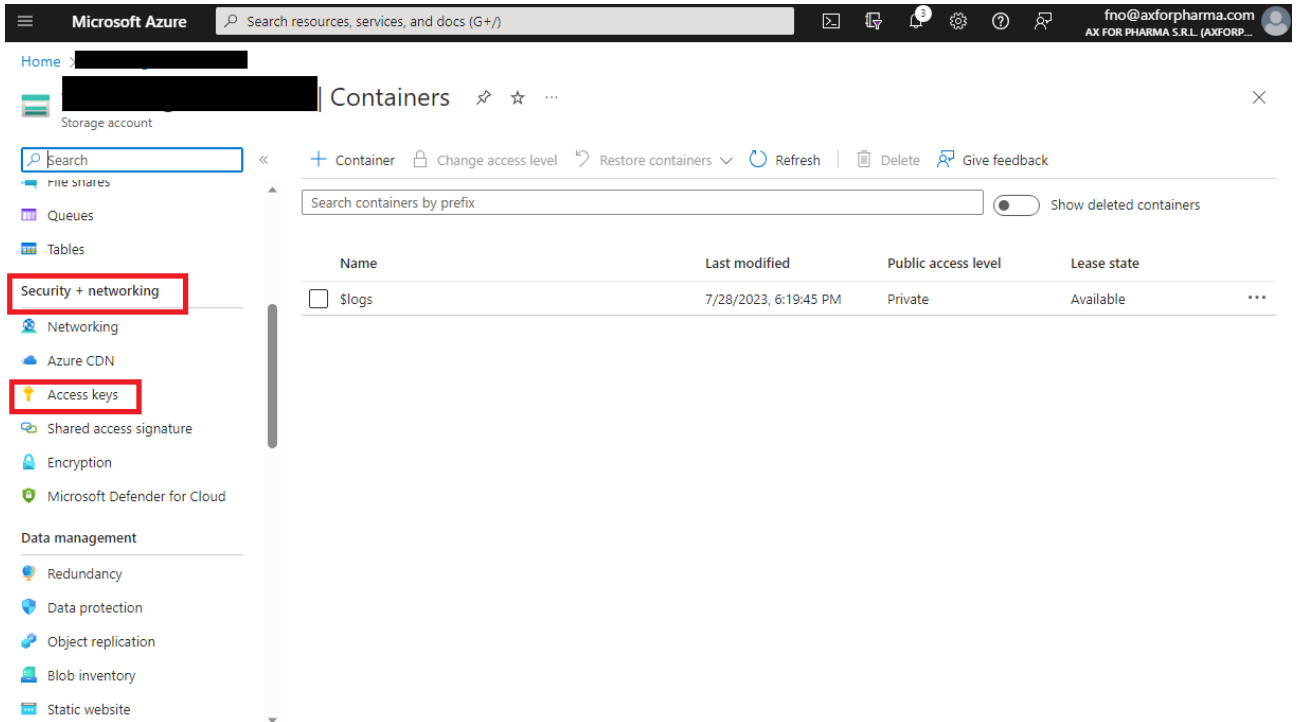


- Repeat the previous steps (3-4) to create a second container. This is the repository of files successfully transferred to the on-premises folder.

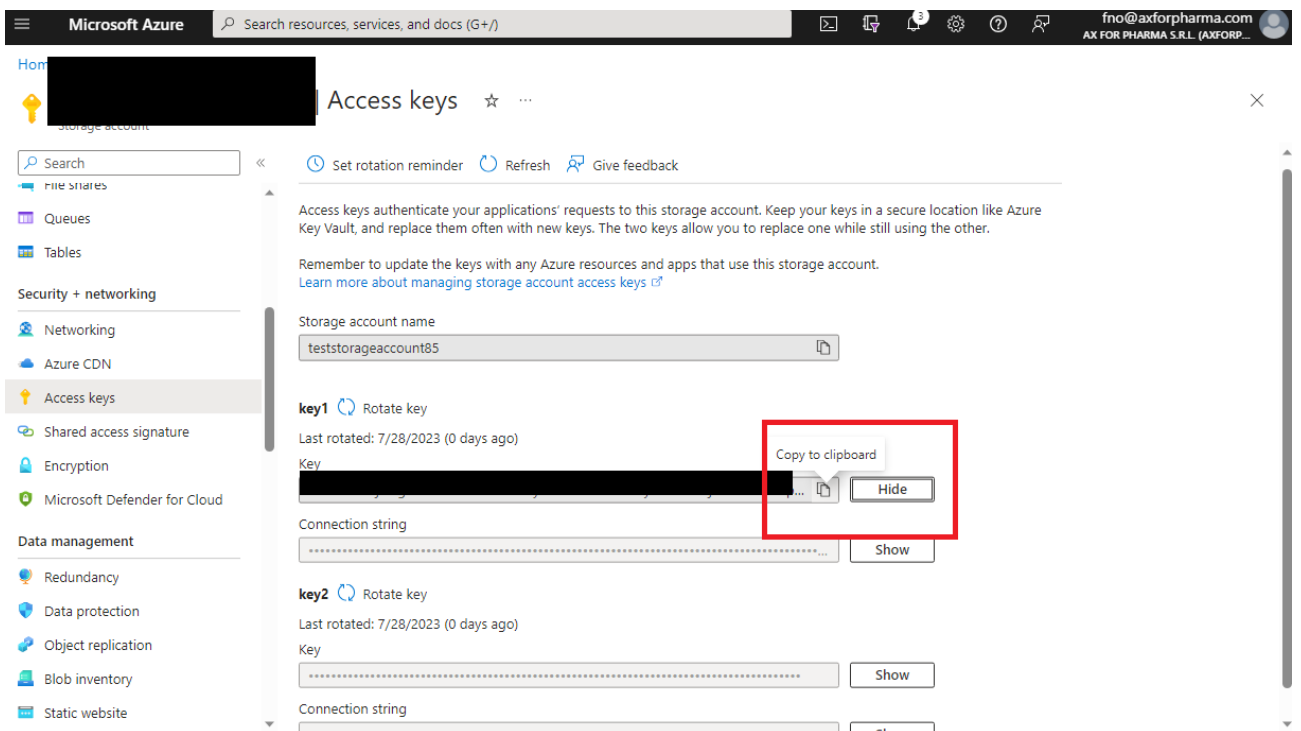


5.1.3 Retrieve Access Keys to the storage account

- In the list of containers page, click on "Security + Networking"> "Access keys".



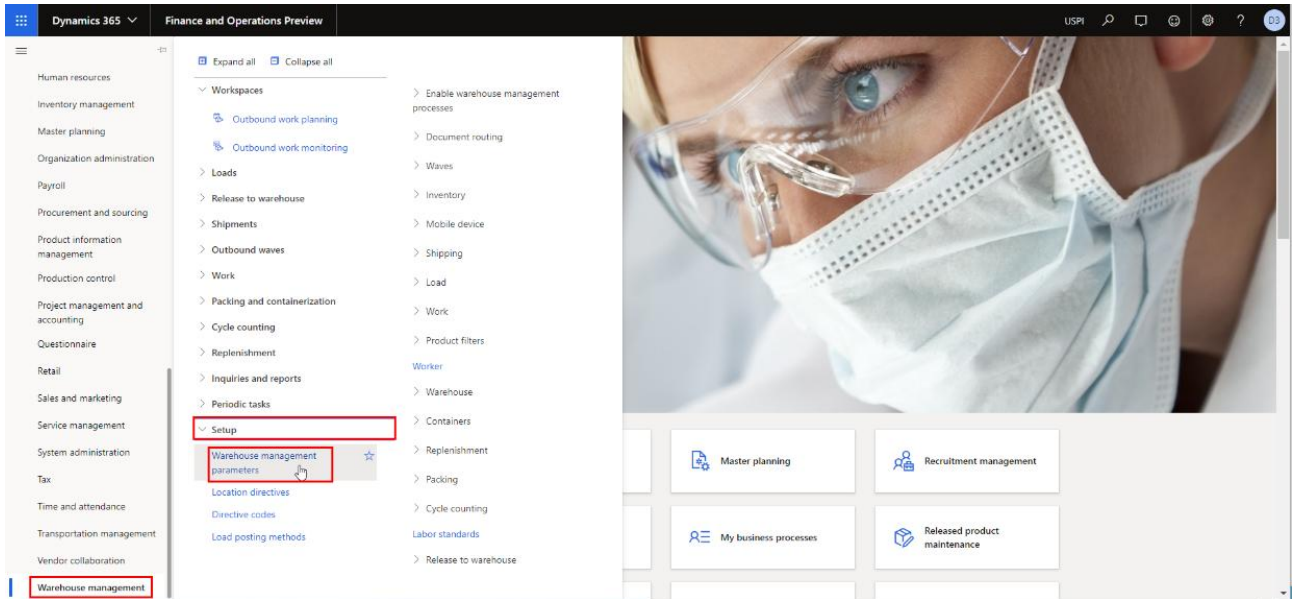
- Copy one of the two keys and save it in a notepad to be used later. Click “Show” and “Copy to clipboard”.



5.2 Setup in Dynamics 365

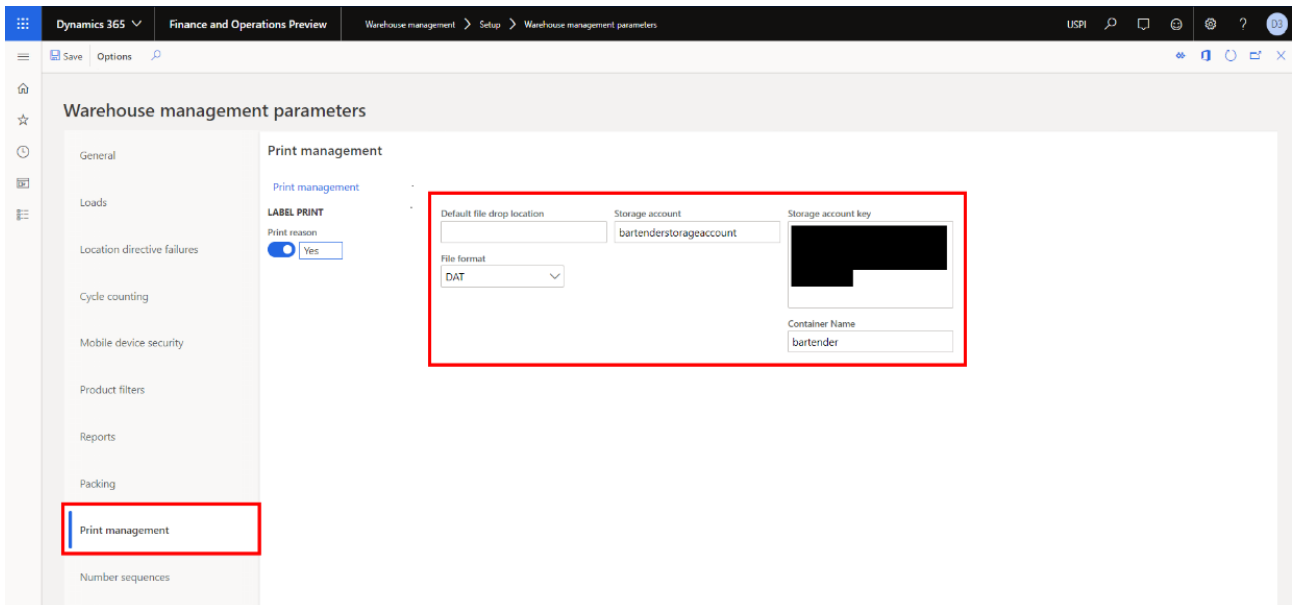
Sign in Dynamics 365 client.

- Go to **Warehouse management > Setup > Warehouse management parameters**.



2. In the "Print Management" tab, fill in the following fields:

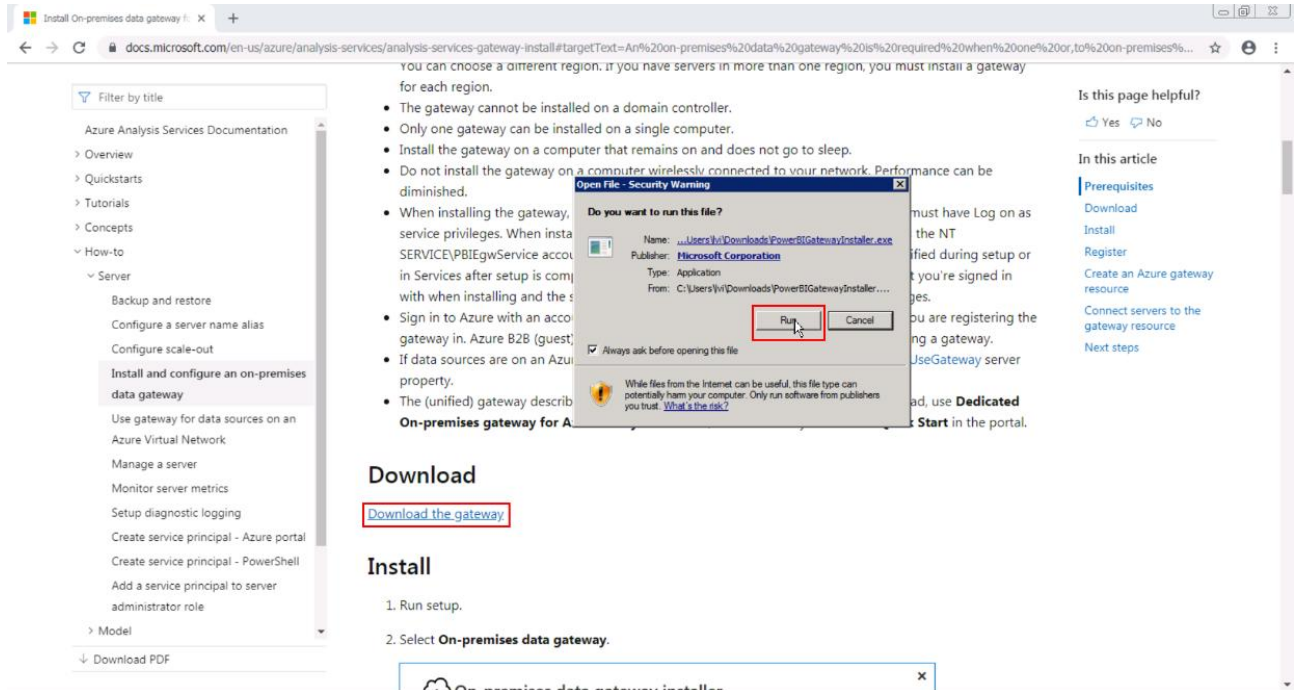
- a. **Storage account:** must be the same as the **Storage account name** created in chapter 5.1.1 (nr. 4);
- b. **Storage account key:** copied from the last step in chapter 5.1.3 (nr. 2);
- c. **Container name:** must be the same as the first container created in chapter 5.1.2 (nr. 4).



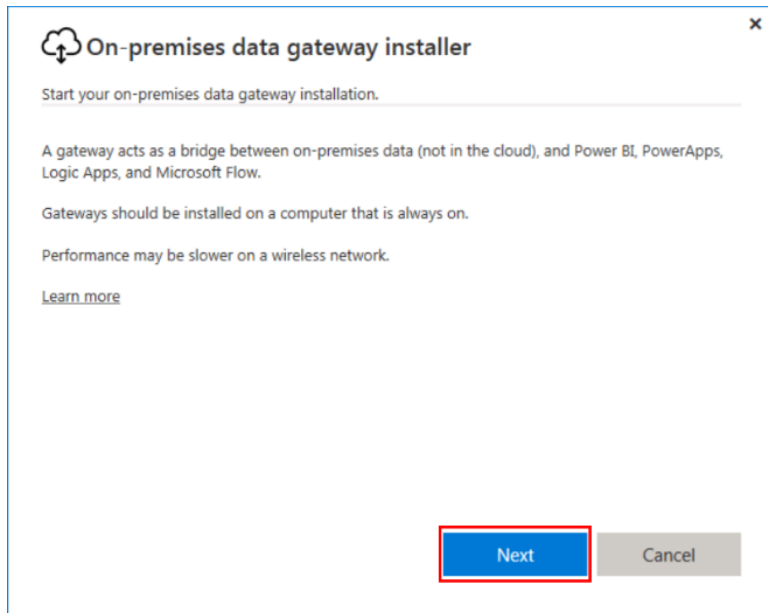
5.3 Create and link on-premises gateway and Azure gateway

5.3.1 Install On-premises data gateway tool

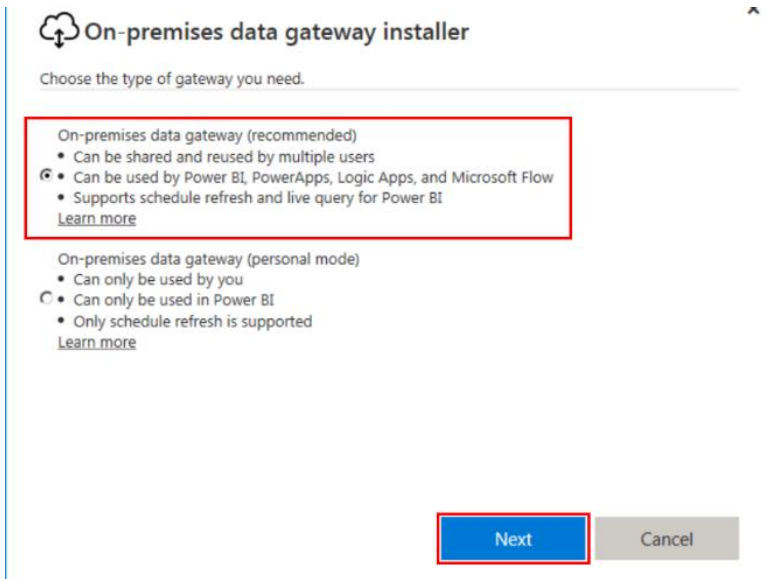
1. Go to: <https://docs.microsoft.com/en-us/azure/analysis-services/analysis-services-gateway-install>
2. From the On-premises machine, download the On-premises data gateway by clicking "Download the gateway" from the webpage on Microsoft and "run" the downloaded file.



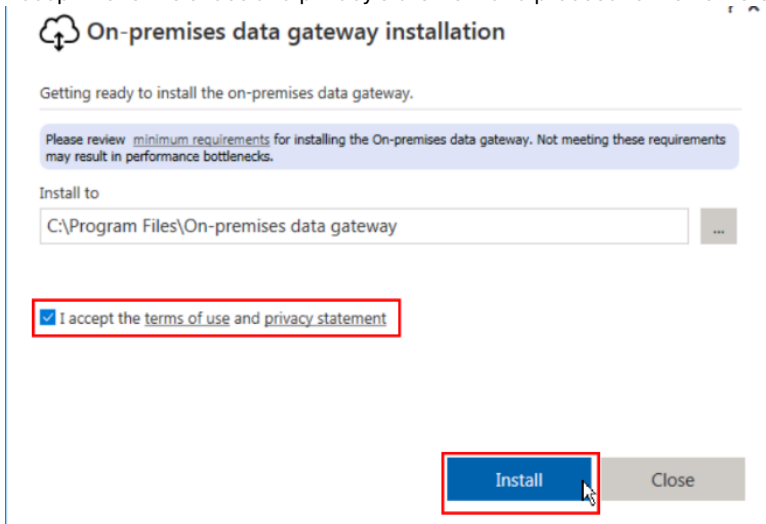
3. Read the instructions carefully and proceed to the next step by clicking "Next".



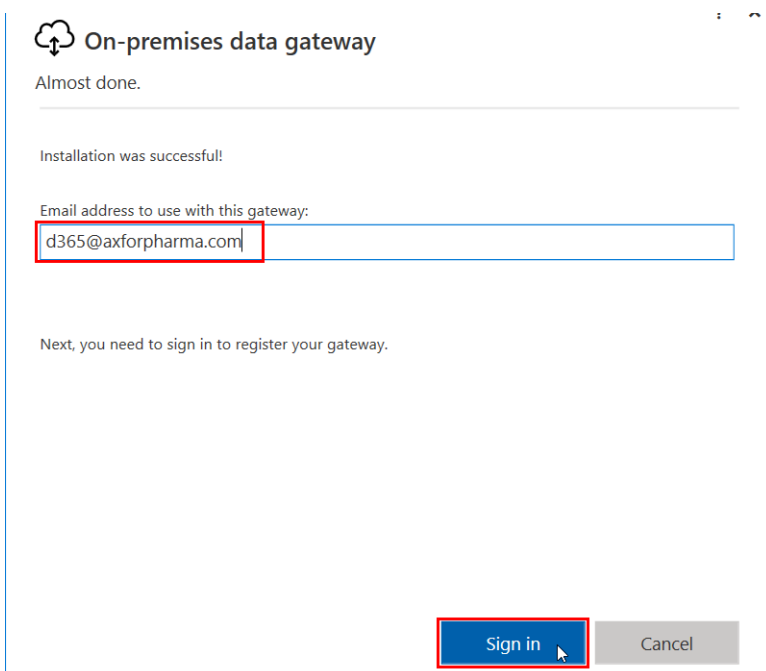
4. Select the recommended installation type and click "Next" to proceed.



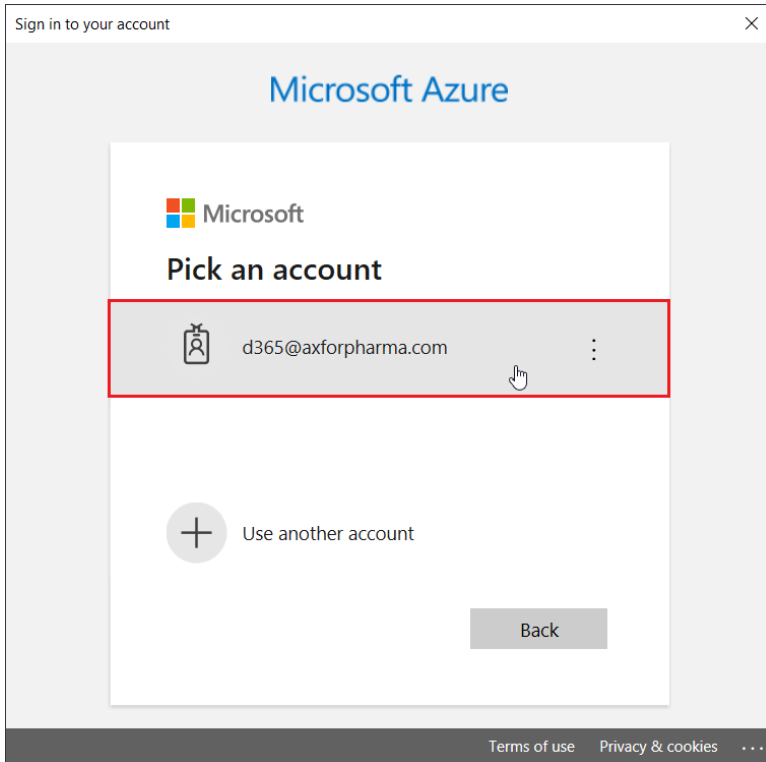
5. Accept the terms of use and privacy statement and proceed to the next step by clicking "Install".



6. Enter the email address linked to the Azure account (i.e. used to set up the storage account in chapter 5.1.1) and click "Sign in".

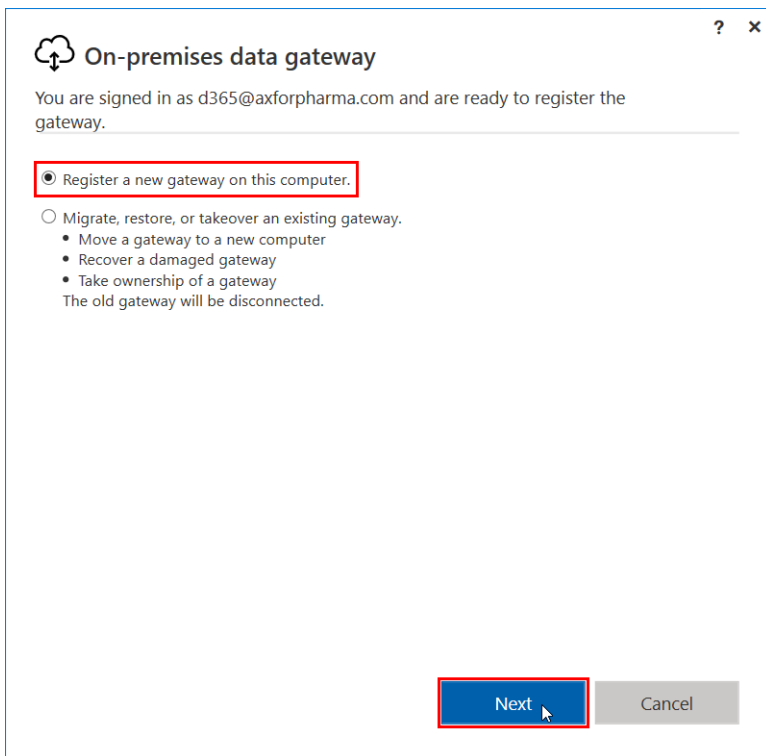


7. Log into the Azure account and click the email address to proceed to the next step.



5.3.2 Create on-premises gateway

1. Select "Register a new gateway on this computer" and click "Next".



2. Enter a gateway name and a Recovery key and click "Configure".

On-premises data gateway
? x

You are signed in as d365@axforpharma.com and are ready to register the gateway.

New on-premises data gateway name

Add to an existing gateway cluster

Recovery key (8 character minimum)

① This key is needed to restore the gateway and can't be changed. Record it in a safe place.

Confirm recovery key

[Learn more about gateway clusters](#)

We'll use this region to connect the gateway to cloud services: North Europe [Change Region](#)

<< Back
Configure

- Take note of the gateway location and click "Create a gateway in Azure" to create the Azure gateway linked to the on-premises gateway.

On-premises data gateway
? x

Status

Service Settings

Diagnostics

Network

Connectors

Recovery Keys

✓

The gateway Bartender Data Gate Way Demo is online and ready to be used.

Gateway version number: 3000.182.4 (July 2023)

Help us improve the on-premises data gateway by sending usage information to Microsoft.
[Read the privacy statement online](#)

Logic Apps, Azure Analysis Services

North Europe
Create a gateway in Azure

Power Apps, Power Automate

North Europe ✓ Ready

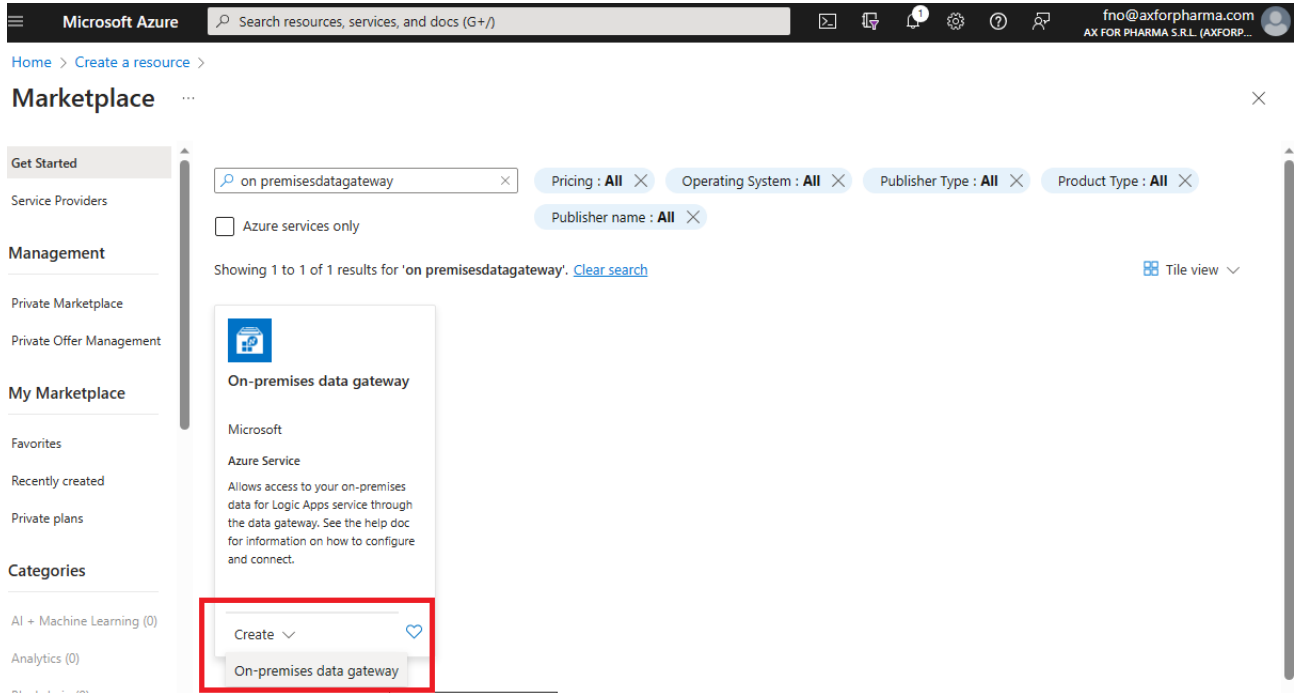
Power BI

Default environment ✓ Ready

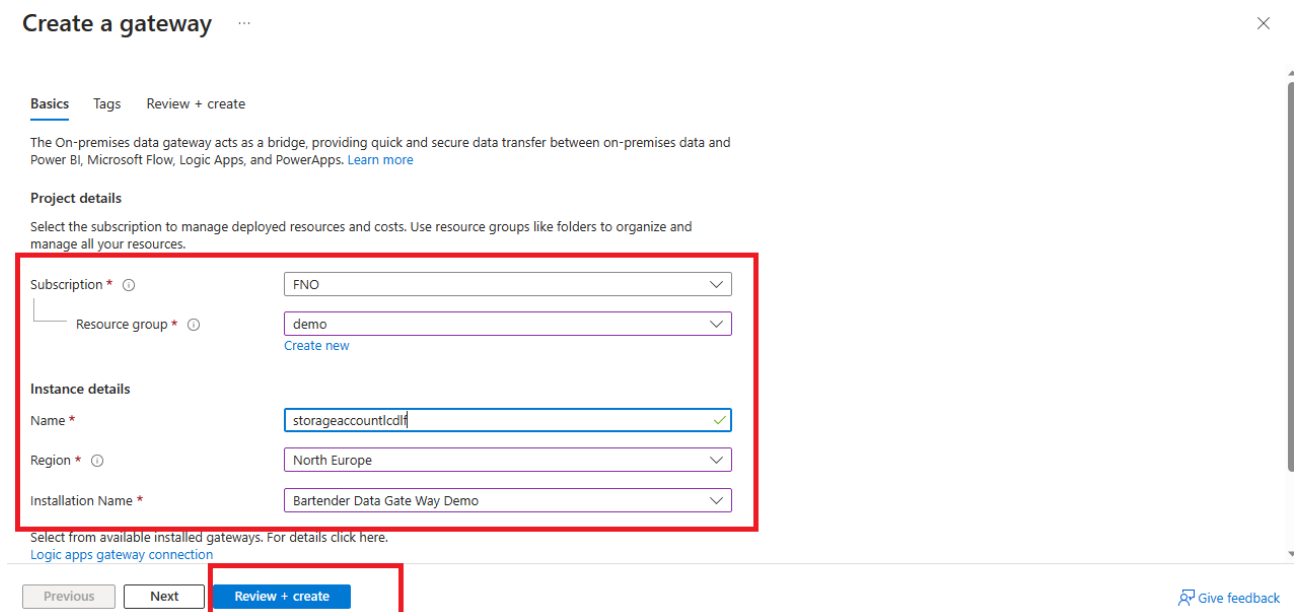
Close

5.3.3 Create Azure gateway

1. In Azure portal, click Create a resource, then search for On-premises data gateway, and then click “Create” > “On-premises data gateway”.



2. In Create connection gateway, enter these settings:
 - a. **Subscription:** verify that the pre-selected value is correct;
 - b. **Resource group:** must be the same as the one chosen in chapter 5.1.1;
 - c. **Name:** must be the same as **Storage account name** selected in chapter 5.1.1;
 - d. **Region:** must be the same as the one in the last step of chapter 5.3.2 (nr. 3)
 - e. **Installation Name:** select the on-premises gateway created in chapter 5.3.2 from the dropdown menu.
3. When you're done, click “Review + create” then “Create”.



Home > Create a resource > Marketplace >

Create a gateway



Basics Tags Review + create

[View automation template](#)

Basics

Subscription	FNO
Resource group	demo
Name	storageaccountcdf
Region	North Europe
Installation Name	Bartender Data Gate Way Demo

[Give feedback](#)

Home >

GatewayCreateBlade-20230802005123 | Overview



Deployment

- Overview
- Inputs
- Outputs
- Template

✔ Your deployment is complete

📄 Deployment name : GatewayCreateBlade-20230802... Start time : 8/2/2023, 1:25:14 AM
 Subscription : FNO Correlation ID : 278c3675-a662-4b31-bcf0-839...
 Resource group : demo

> Deployment details

∨ Next steps

[Go to resource](#)



Cost management

Get notified to stay within your budget and prevent unexpected charges on your bill.
[Set up cost alerts >](#)



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Secure your apps and infrastructure
[Go to Microsoft Defender for Cloud >](#)

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Work with an expert

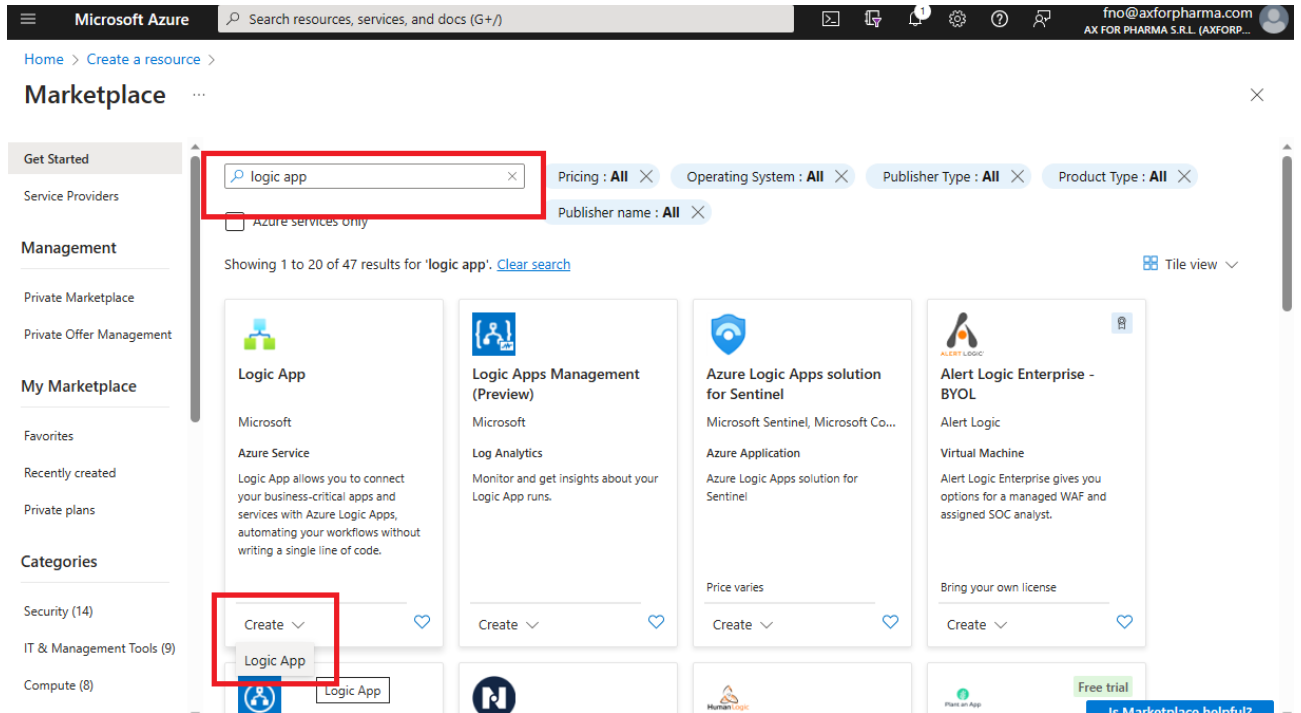
Azure experts are service provider partners who can help manage your assets on Azure and be your first line of support.

[Find an Azure expert >](#)

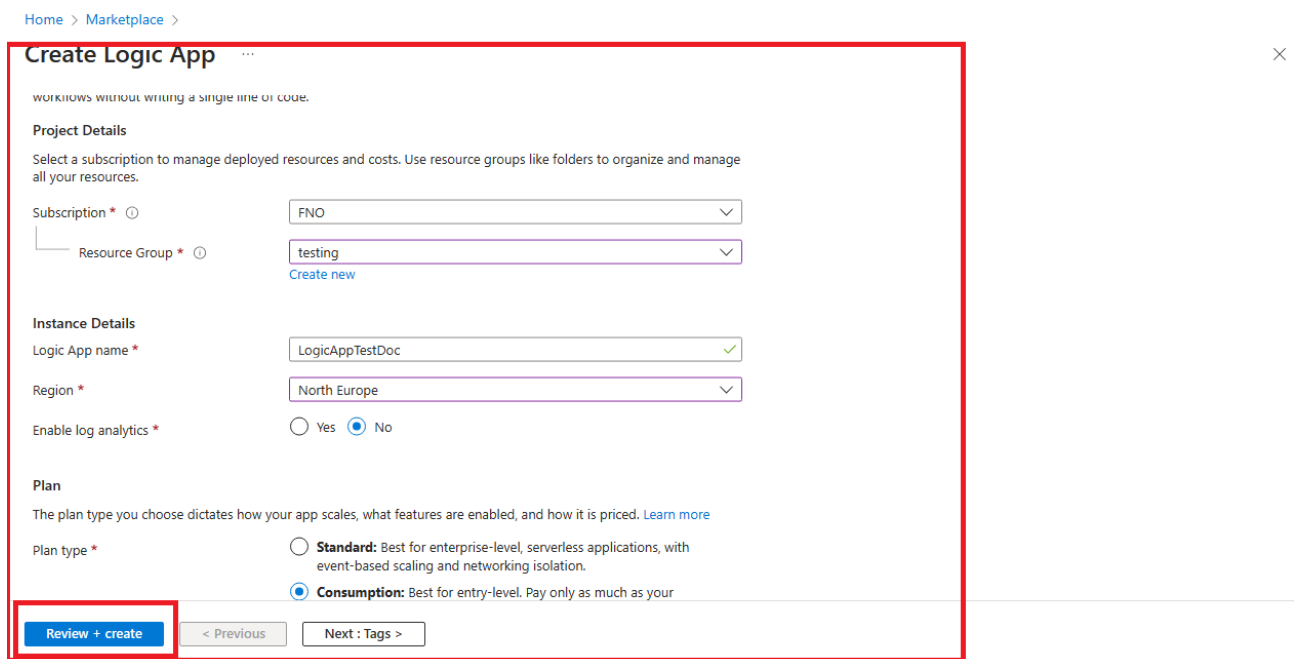
5.4 Configure Logic App

5.4.1 Configure Logic App

1. Go to the Microsoft Azure site: <https://portal.azure.com/#home>.
2. Click "Create a resource".
3. Search and click "Create" > "Logic App".



4. In the Logic App, fill in the following fields:
 - a. **Subscription:** verify that the pre-selected value is correct;
 - b. **Resource group:** click "Use existing" and select the one created in chapter 5.1.1;
 - c. **Logic App Name:** it must be different from the existing Logic Apps' names;
 - d. **Region:** it is recommended to choose the region closest to the on-premises pc.
 - e. **Enable log analytics:** Pick "No"
 - f. **Plan type:** Pick "Consumption" in order to pay only when the logic app is executed.
5. Click "Review + Create".




6. Click "Create".

Home > Marketplace >

Create Logic App

Basics Tags Review + create

Summary

 **Logic App**
by Microsoft

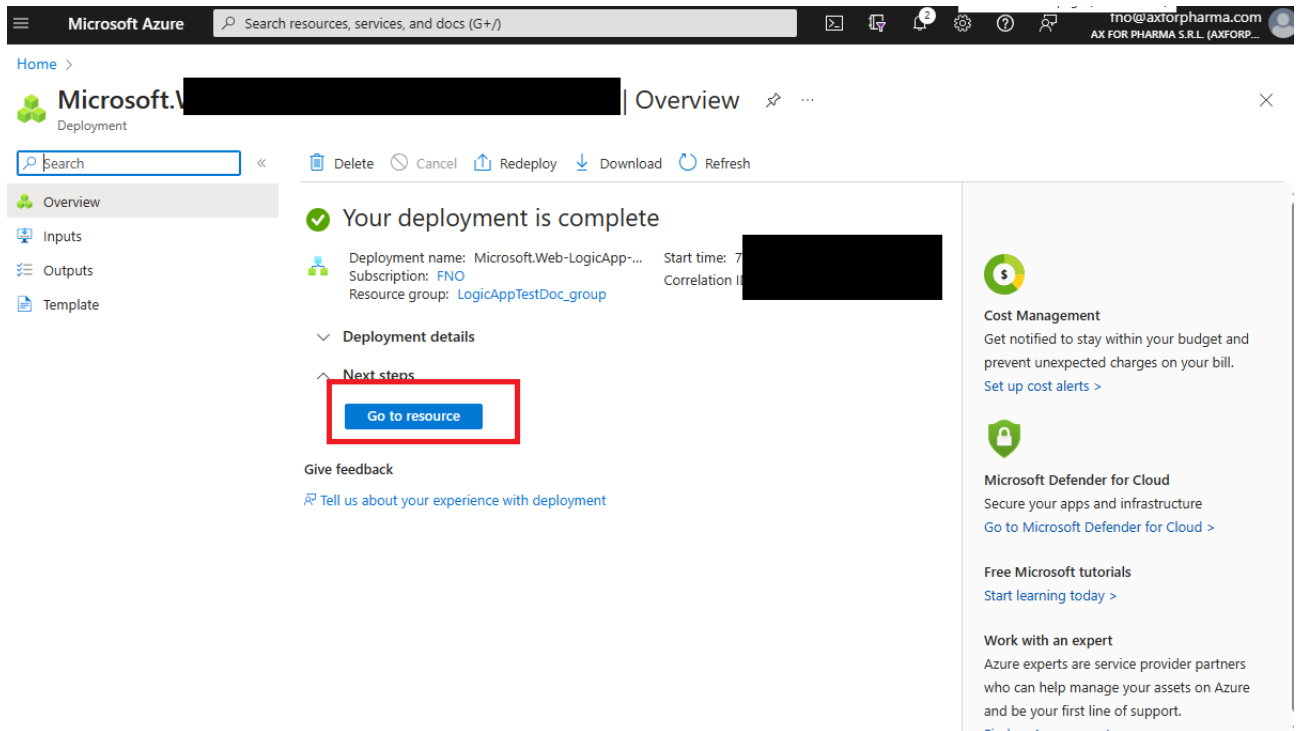
Details

Subscription	e6e0384f-0741-4cdb-af29-bfdb37e71db9
Resource Group	testing
Name	LogicAppTestDoc
Region	northeurope
Zone redundancy (preview)	Not enabled
Log analytics	Disabled

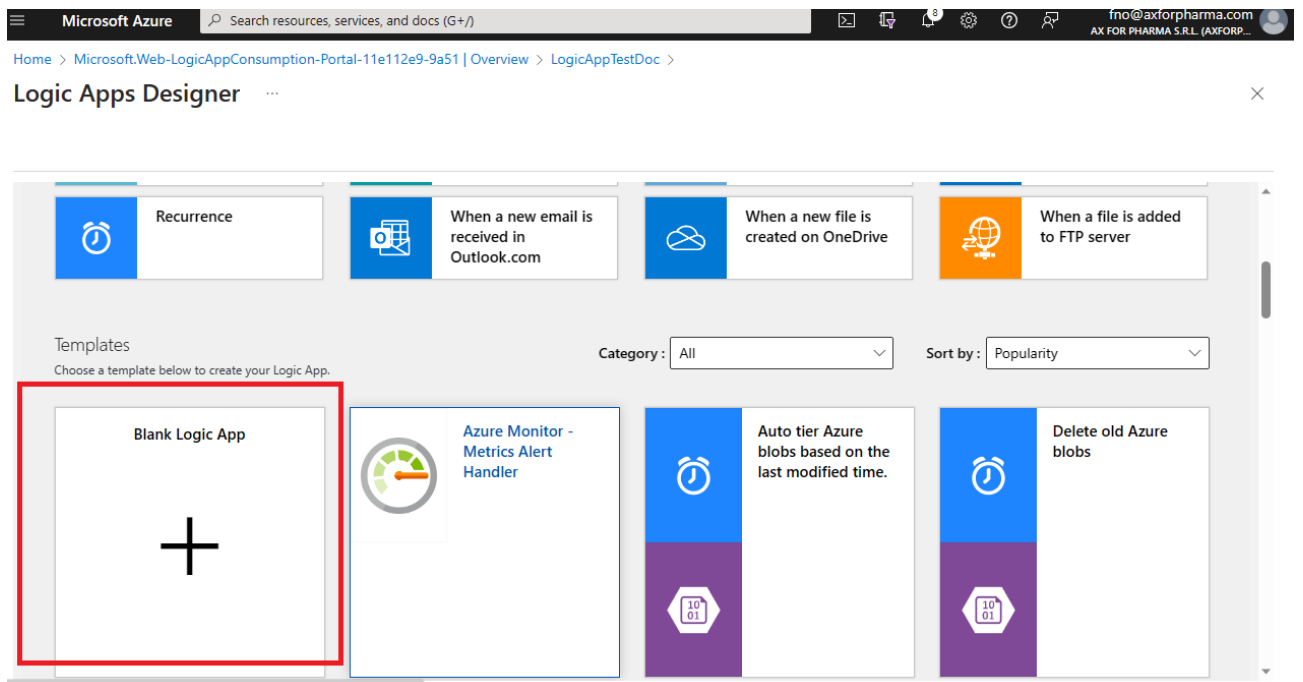
Create < Previous Next > [Download a template for automation](#)

5.4.2 Design workflow

1. In the window (that opens automatically), click "Go to resource" or go to the logic app page created in chapter 5.4.1.

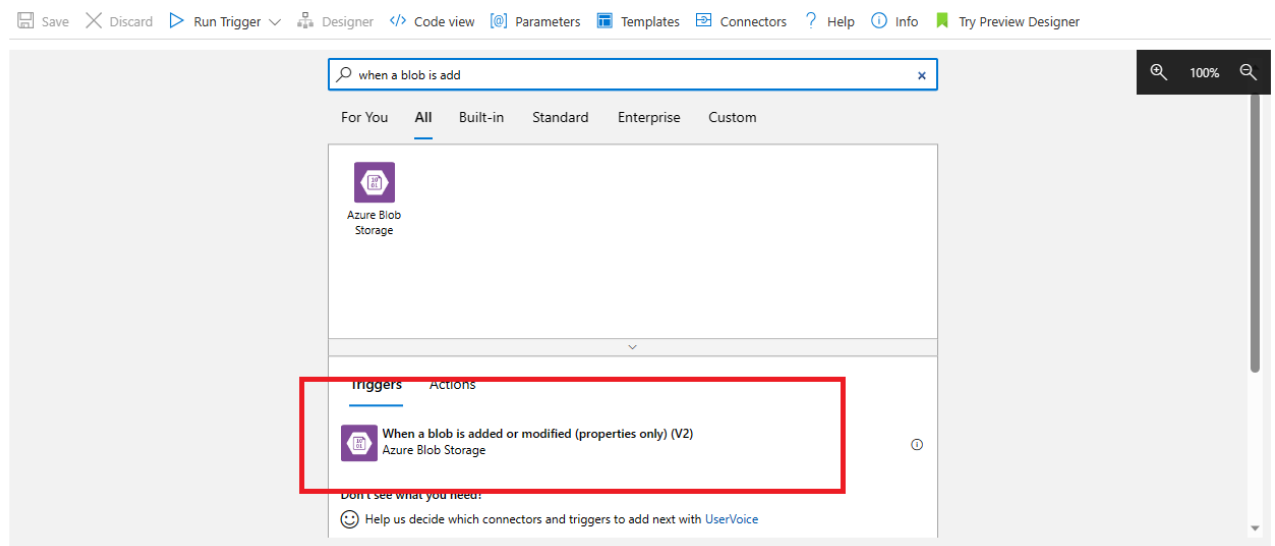


2. Click "Blank Logic App" over "Templates"



3. Search When a blob is added to select the Trigger of "When a blob is added or modified (properties only) (V2)".

Logic Apps Designer



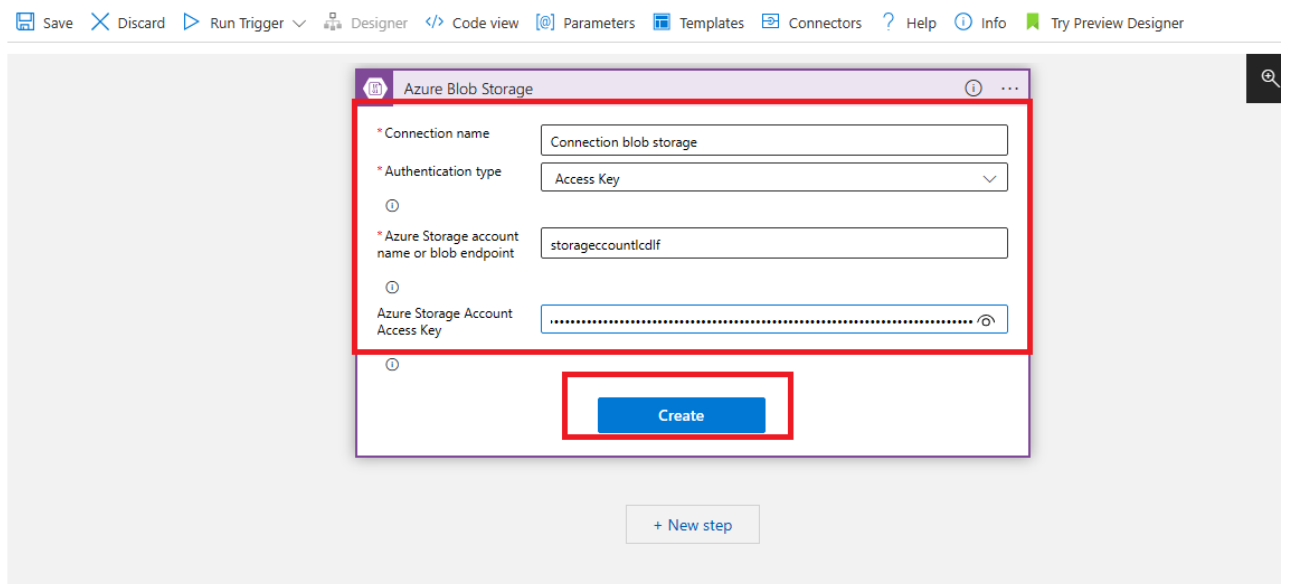
4. Setup the connection:

- a. **Connection name:** Choose a name for the connection
- b. **Authentication Type:** Pick "Access key"
- c. **Azure storage account name or blob endpoint:** Select/Fill the Storage account created in chapter 5.1.1
- d. **Azure Storage Account Access Key:** Use the access key copied in chapter 6.1.3.2

Click "Create"

[Home](#) > [Microsoft.Web-LogicAppConsumption-Portal-11e112e9-9a51 | Overview](#) > [LogicAppTestDoc](#) >

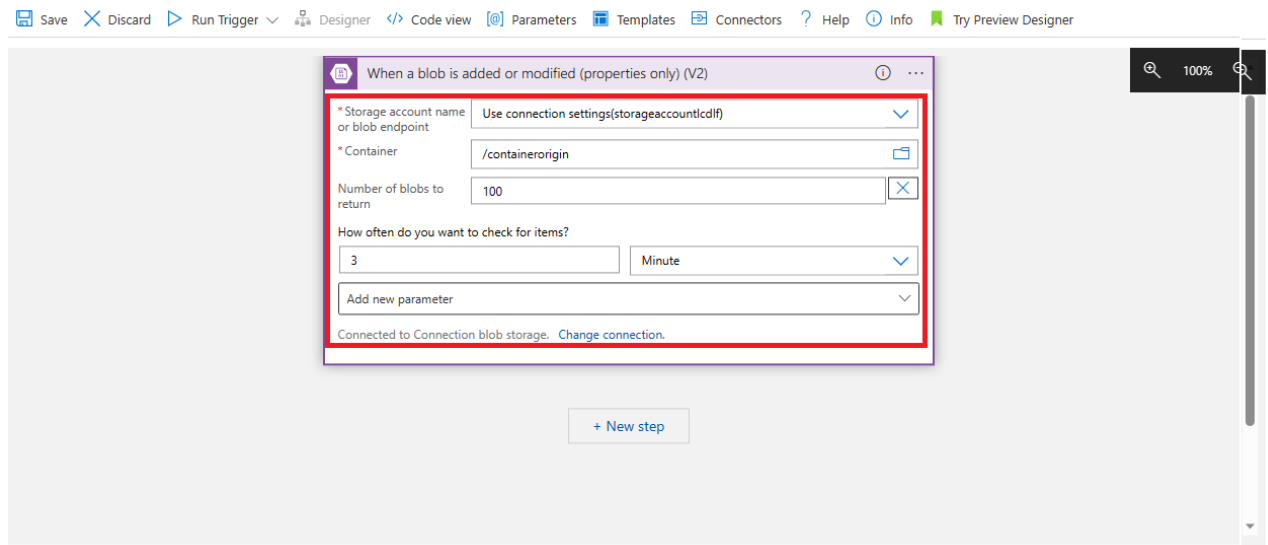
Logic Apps Designer



5. Fill the following fields:

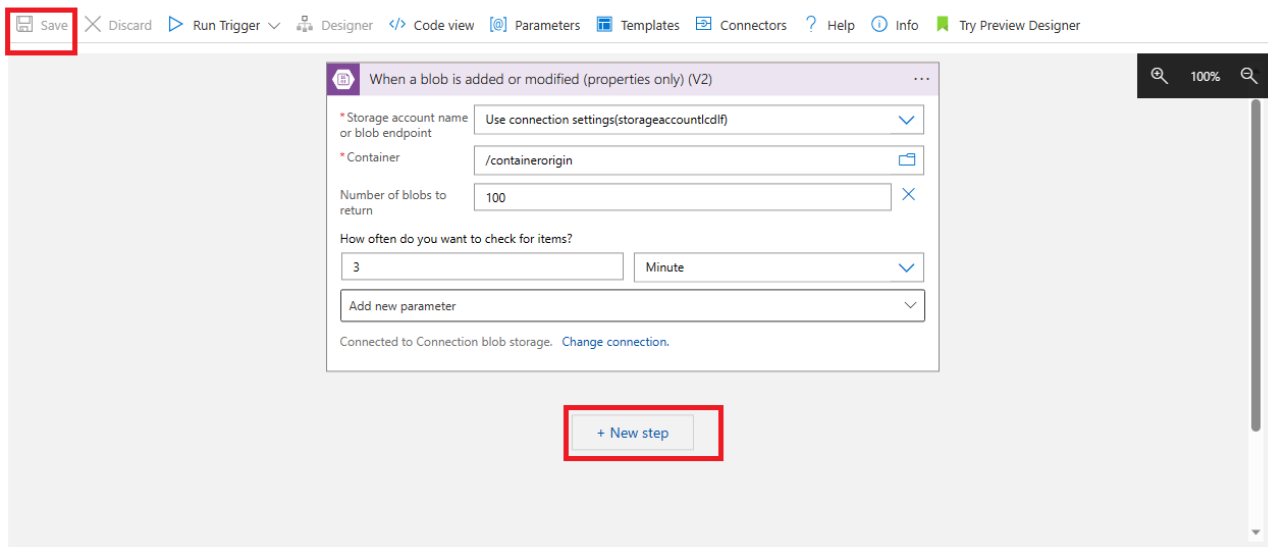
- a. **Storage Account Name Or Blob Endpoint:** Select the Storage account created in chapter 5.1.1
- b. **Container:** same name as the first container created in chapter 5.1.2 for files waiting to be transferred to the on-premises machine
- c. **Number of blobs to be return:** the desired maximum number of files to be
- d. **How often do you want to check for items?:** select the desired interval of execution

Logic Apps Designer



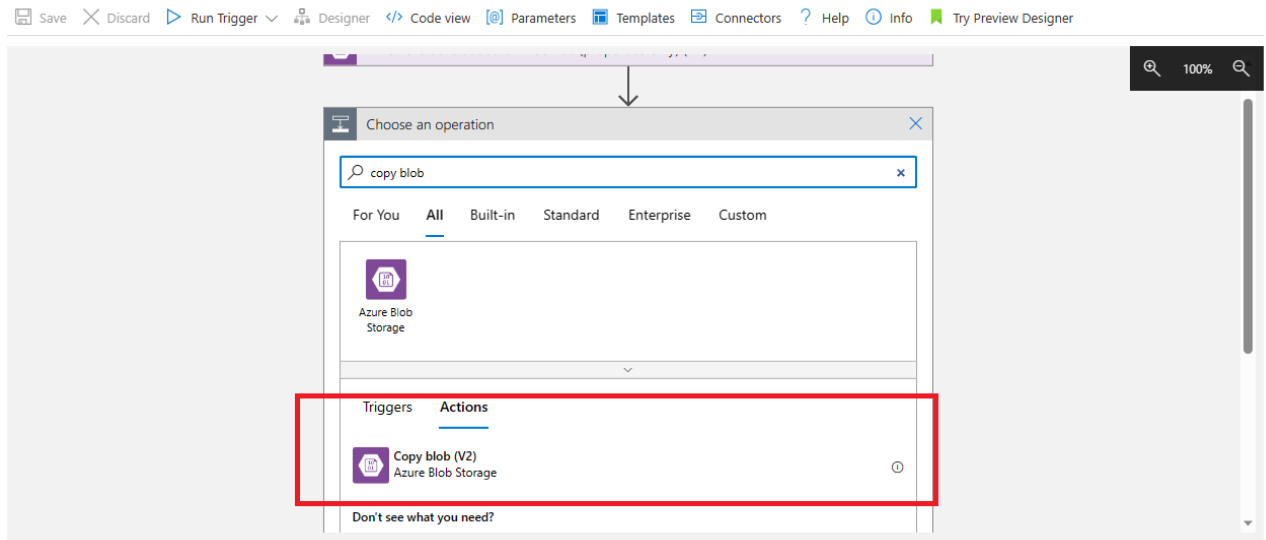
6. Click "Save" and "New step"

Logic Apps Designer



7. Search for Copy blob to select the Action "Copy blob (V2)"

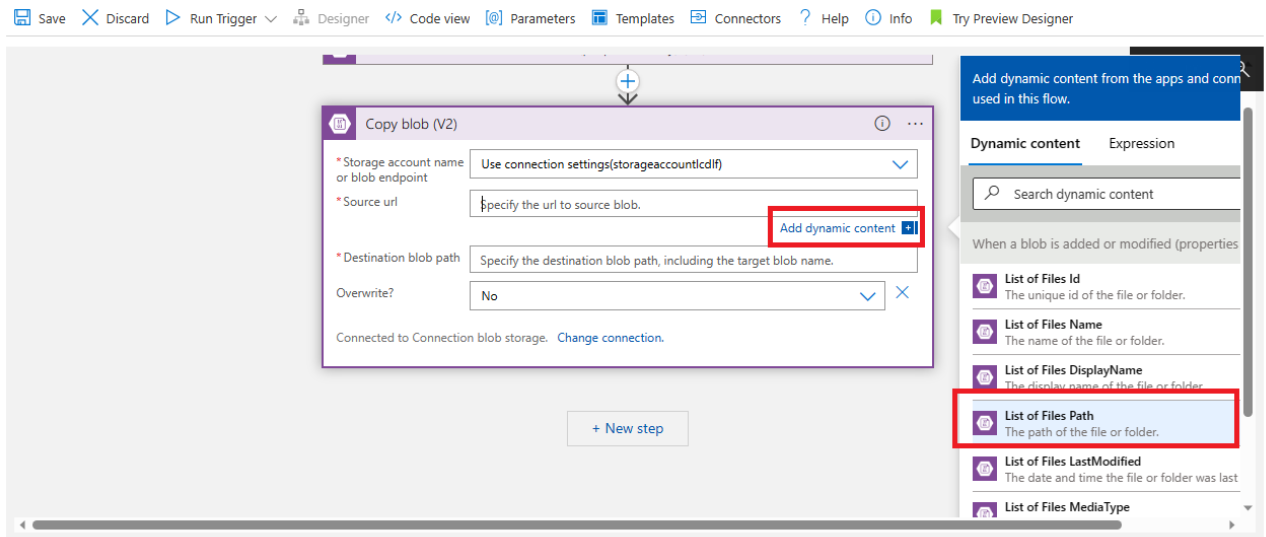
Logic Apps Designer



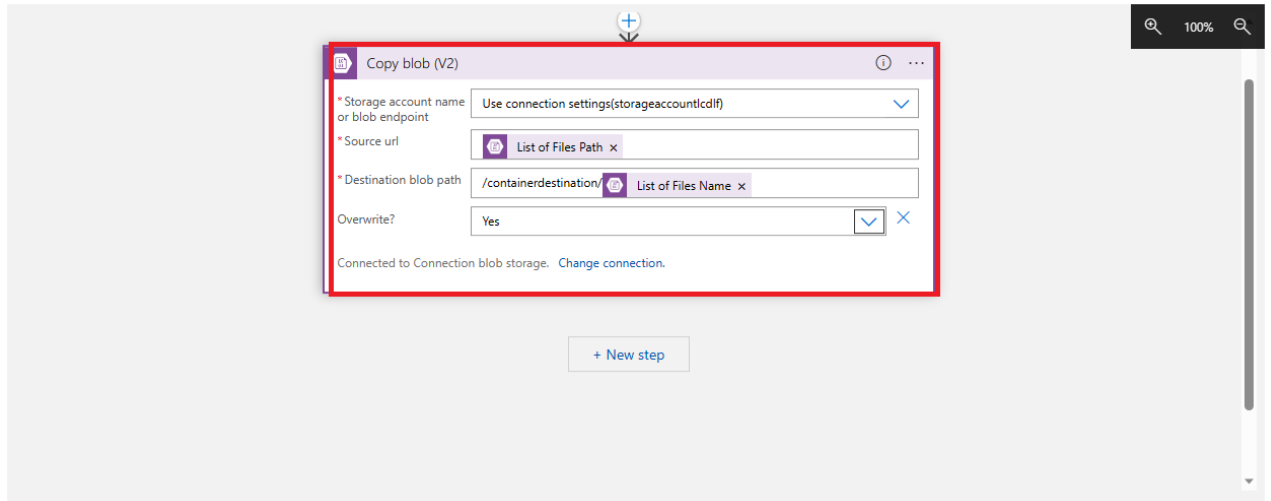
8. Fill the following parameters:

- a. **Storage Account Name or Blob Endpoint:** Select the Storage account created in chapter 5.1.1
- b. **Source Url:** Click “Add dynamic content” and select “List of Files Path”
- c. **Destination Blob Path:** Enter a slash followed by the container's name where the processed files transferred to the on-premises machine is stored (i.e. the second container created in chapter 5.1.2), then add a slash and click "Insert dynamic content", search files name and select "List of Files Name".
- d. **Overwrite?:** Yes if files must be overwritten.
NOTE: It must be set to “Yes” in order to reprint labels.

Logic Apps Designer



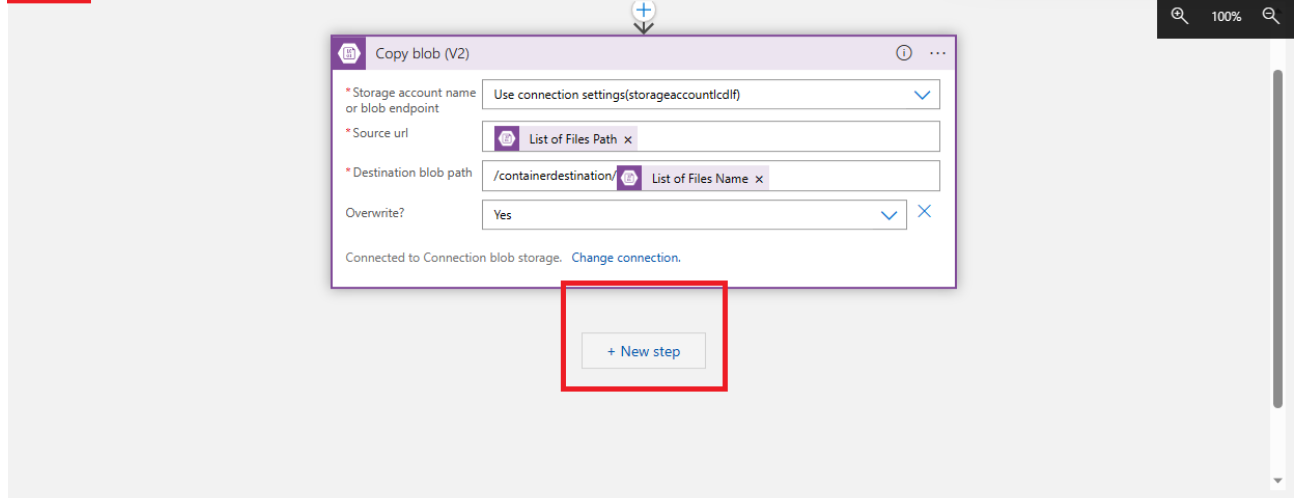
Logic Apps Designer



9. Click “Save” and “New step”

Logic Apps Designer

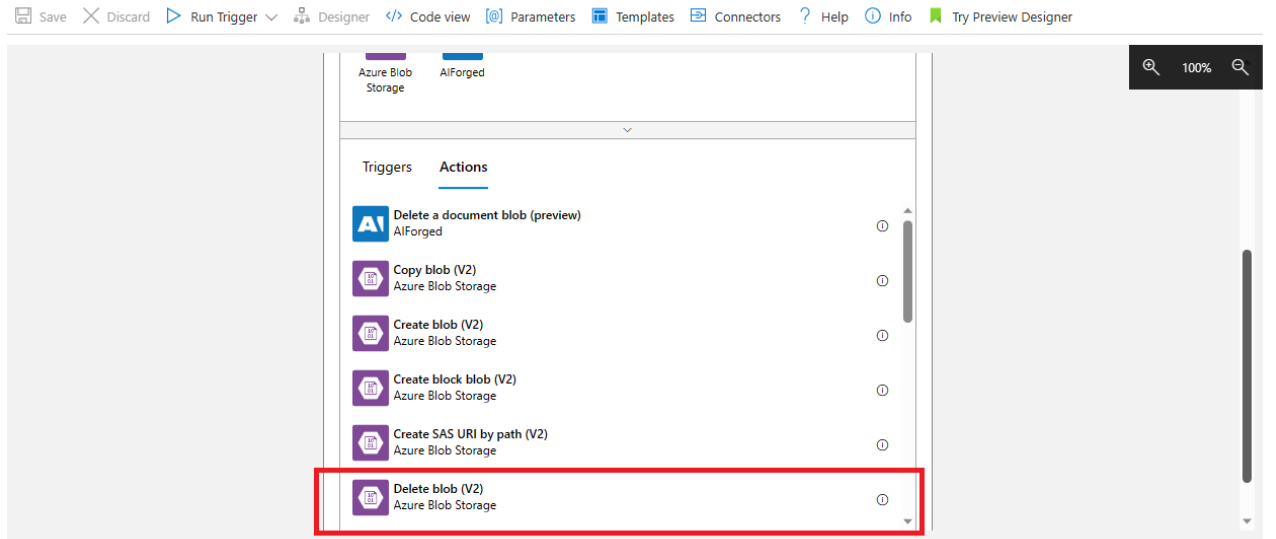
Save logic app completed
Logic app: LogicAppTestDoc was saved successfully



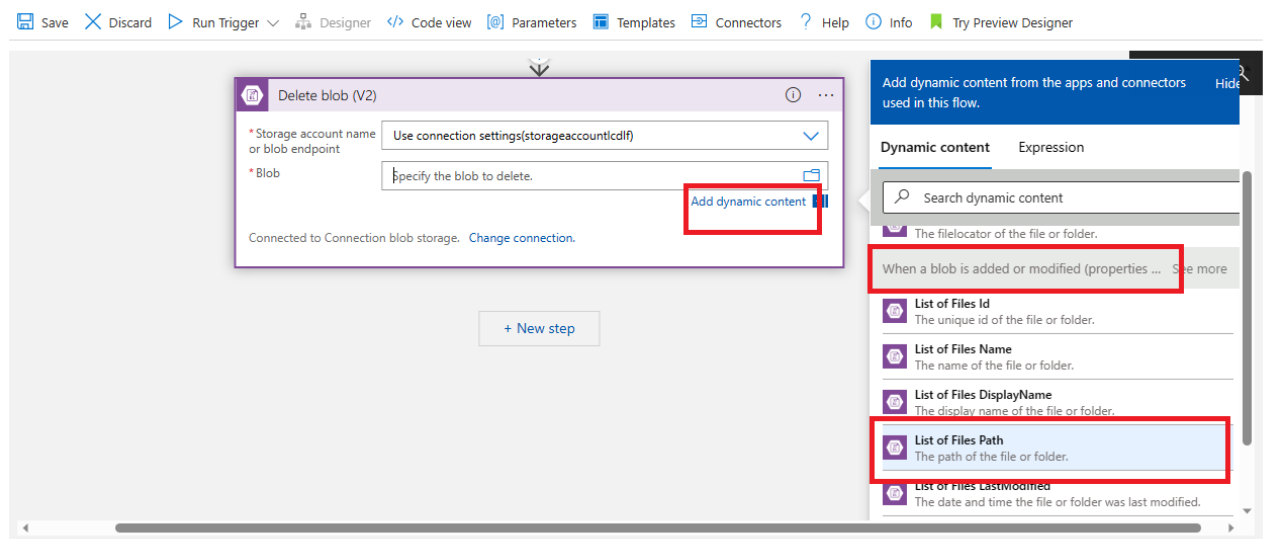
10. Search and select the Action Delete blob (V2).

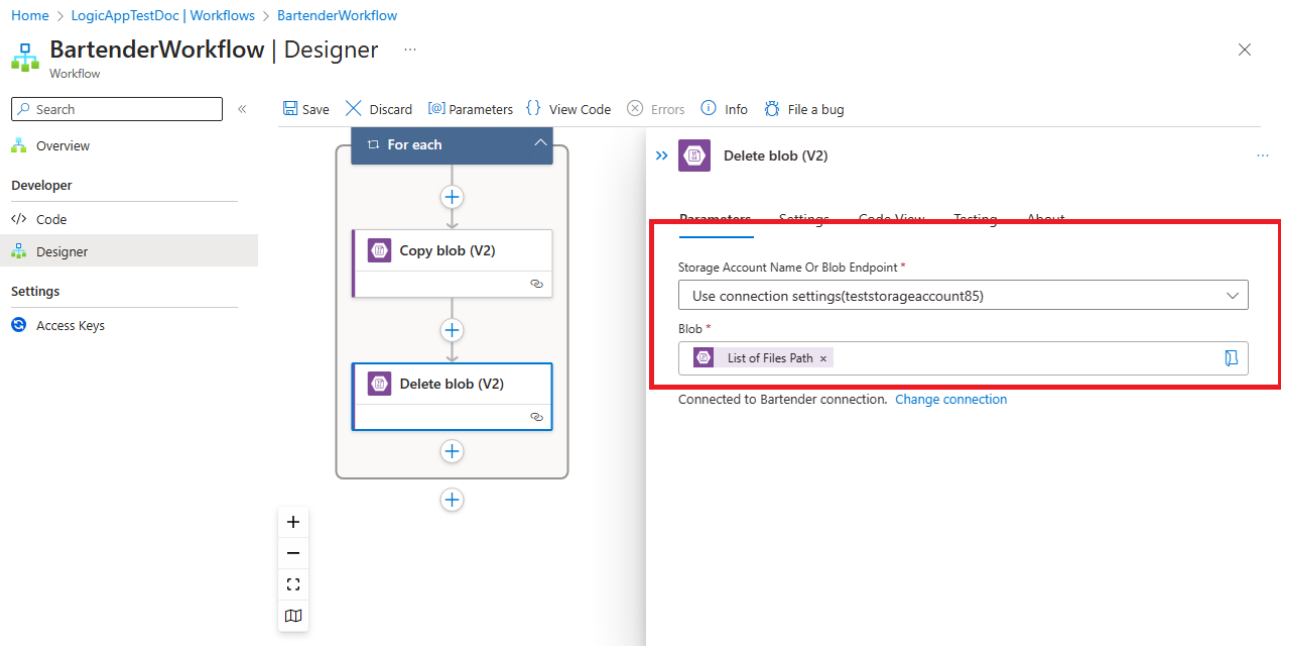
In the Storage Account Name Or Blob Endpoint select the Storage account created in chapter 5.1.1
In the Blob field, click “Add dynamic content” and select “List of Files Path”

Logic Apps Designer

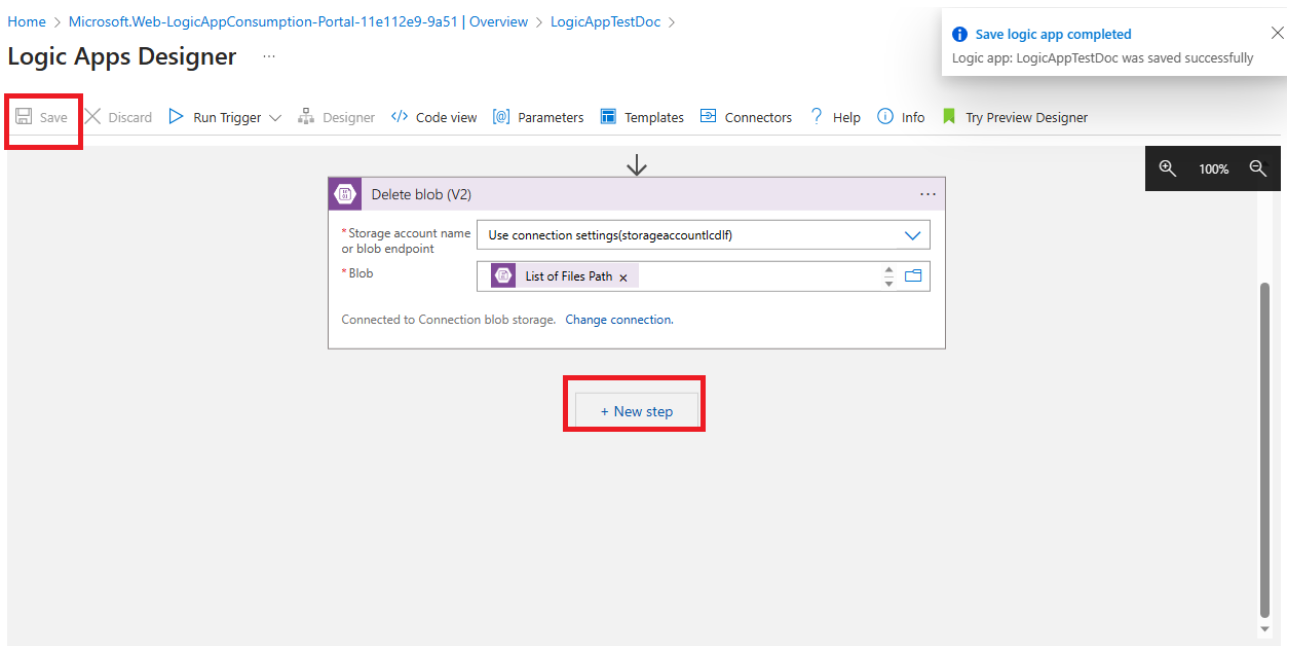


Logic Apps Designer





11. Click "Save" and "New step"

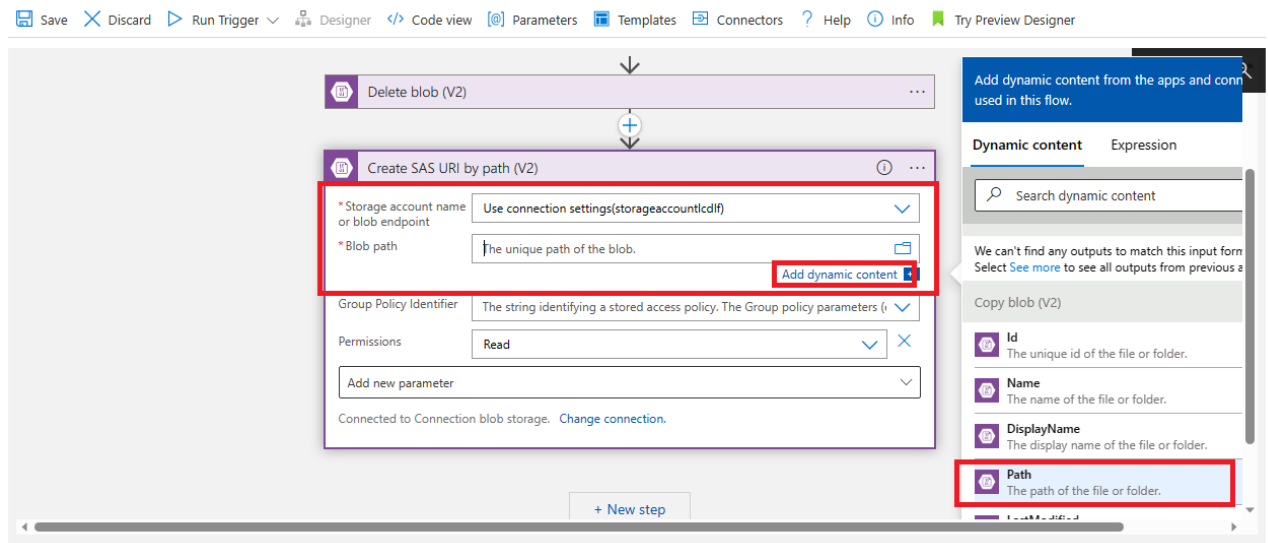


12. Search and select the Action "Create SAS URI by path (V2)".

In the Storage account name or blob endpoint select the storage account created in chapter 5.1.1

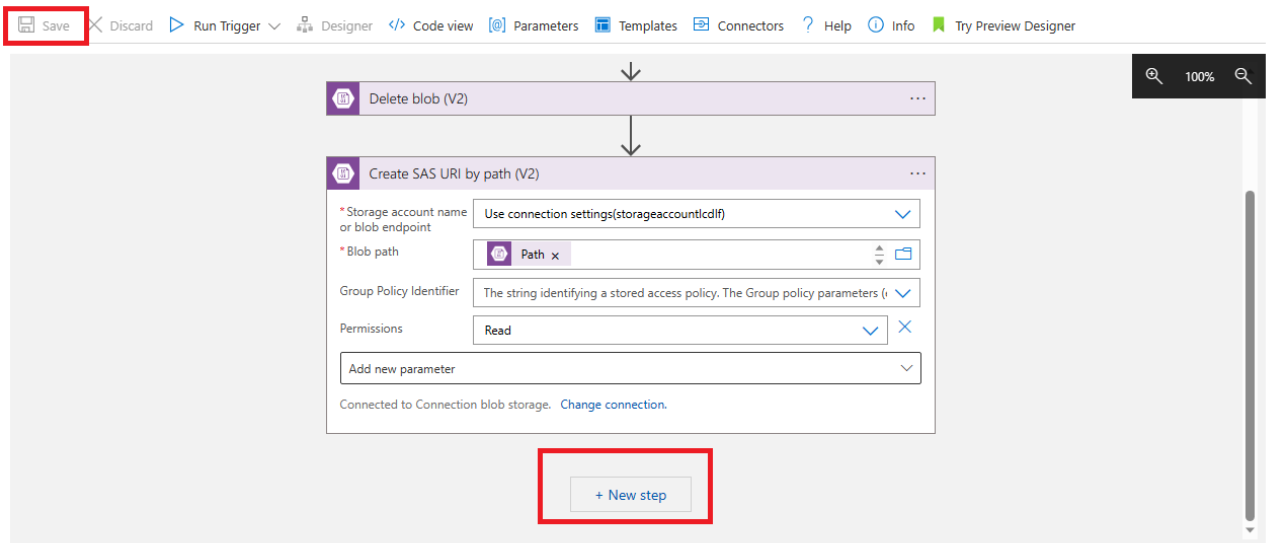
In the Blob path field, click "Add dynamic content" and select Path under Copy blob (V2).

Logic Apps Designer



13. Click "Save" and "New step".

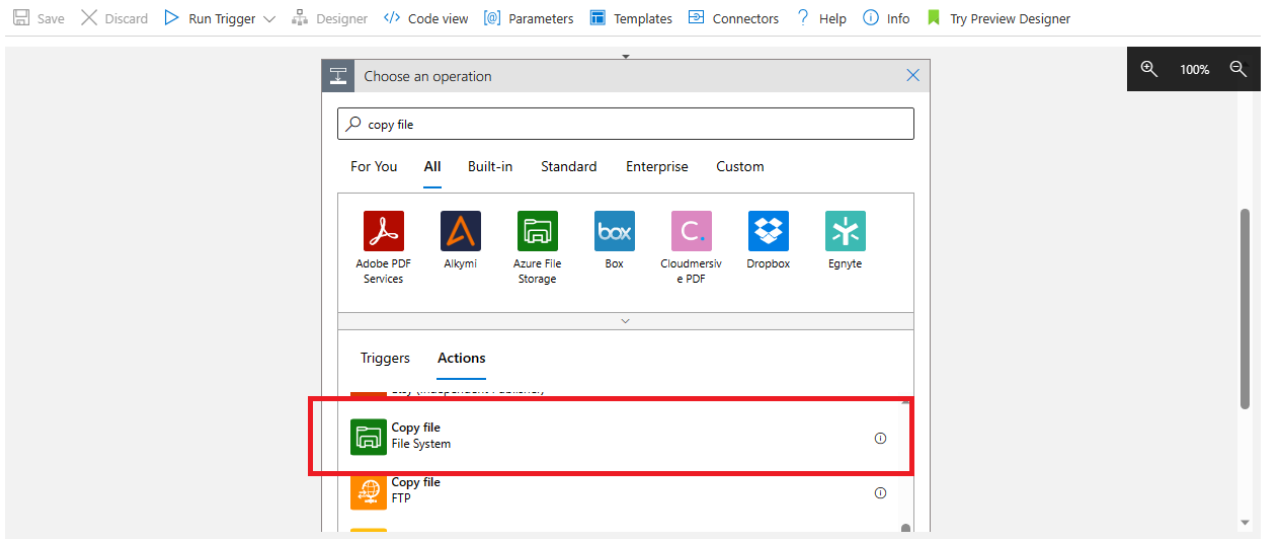
Logic Apps Designer



14. Search and select the Action “Copy file” under the "File System" category.

[Home](#) > [Microsoft.Web-LogicAppConsumption-Portal-11e112e9-9a51](#) | [Overview](#) > [LogicAppTestDoc](#) >

Logic Apps Designer



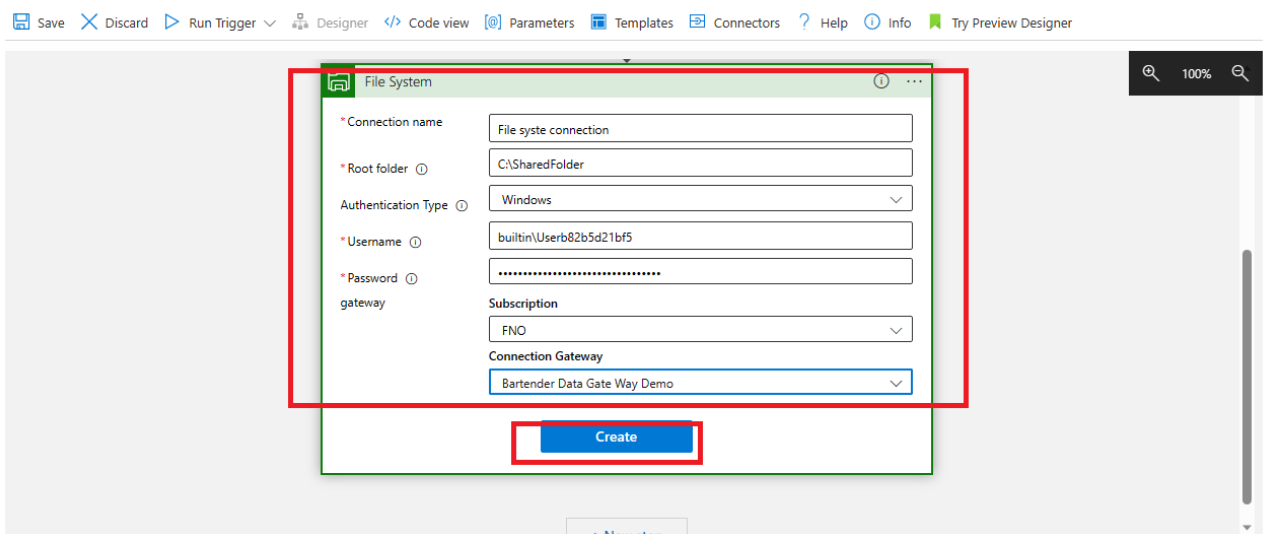
15. Under the File system, fill in the following fields:

- Connection Name;**
- Root folder:** define where the files should be transferred/folder on the on-premises machine;
- Authentication Type;**
- Username:** authentication information of the on-premises machine;
- Password:** authentication information of the on-premises machine;
- Subscription;**
- Connection Gateway:** select the on-premises gateway created in chapter 5.3.2.

16. Click "Create New" as confirmation.

[Home](#) > [Microsoft.Web-LogicAppConsumption-Portal-11e112e9-9a51](#) | [Overview](#) > [LogicAppTestDoc](#) >

Logic Apps Designer



17. Under the Copy file, fill in the following fields:

- Source path:** click the “Add dynamic content” and select **Web Url**;
- Destination file path:** Add the “Root folder” selected on the previous step followed by slash plus the “Name” from the dynamic content.

Note: if a subfolder is needed, it is possible to write "*subfolder*" before adding the dynamic content "Name" (where *subfolder* must be substituted by the desired subfolder name);

c. **Overwrite?:** Yes if files must be overwritten.

Home > Microsoft.Web-LogicAppConsumption-Portal-11e112e9-9a51 | Overview > LogicAppTestDoc >

Logic Apps Designer

The screenshot shows the Logic Apps Designer interface. The workflow consists of three steps: 'Delete blob (V2)', 'Create SAS URI by path (V2)', and 'Copy file'. The 'Copy file' step is currently selected and highlighted with a green border. Its configuration panel shows:

- Source path:** A text field containing 'Web Uri x |' with a red box around it. An 'Add dynamic content' button is visible to the right of this field.
- Destination file path:** A text field containing 'Destination file path, including target filename'.
- Overwrite?:** A dropdown menu set to 'No'.

 The right-hand sidebar displays a search for dynamic content. The 'Web Uri' option is highlighted with a red box and described as 'A URL to an object with access token.' Below it, other options like 'Delete blob (V2)', 'Copy blob (V2)', 'Id', and 'Name' are listed.

Home > LogicAppTestDoc

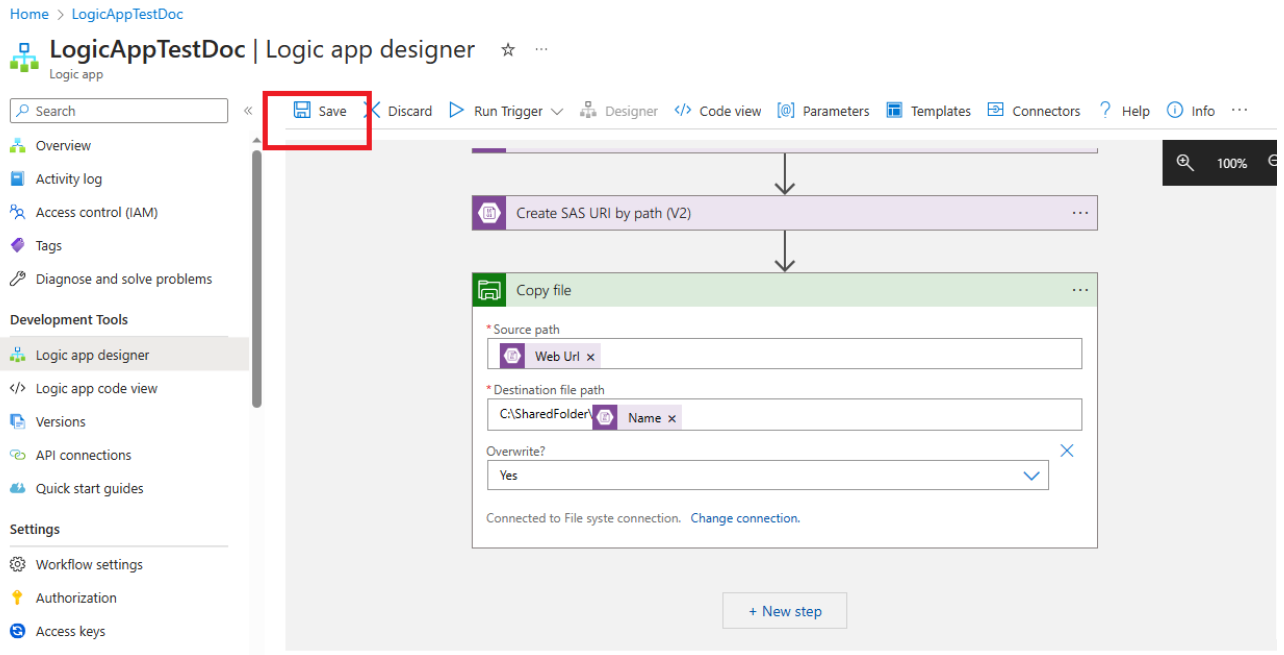
LogicAppTestDoc | Logic app designer

This screenshot shows the Logic Apps Designer interface for the 'LogicAppTestDoc' app. The 'Copy file' step is selected and highlighted with a green border. Its configuration panel shows:

- Source path:** A text field containing 'Web Uri x'.
- Destination file path:** A text field containing 'C:\SharedFolder\' with a red box around it. An 'Add dynamic content' button is visible to the right.
- Overwrite?:** A dropdown menu set to 'Yes'.

 The right-hand sidebar displays a search for dynamic content. The 'Name' option is highlighted with a red box and described as 'The name of the file or folder.' Other options like 'DisplayName', 'ETag', 'FileLocator', 'Id', 'LastModified', and 'MediaType' are also visible.

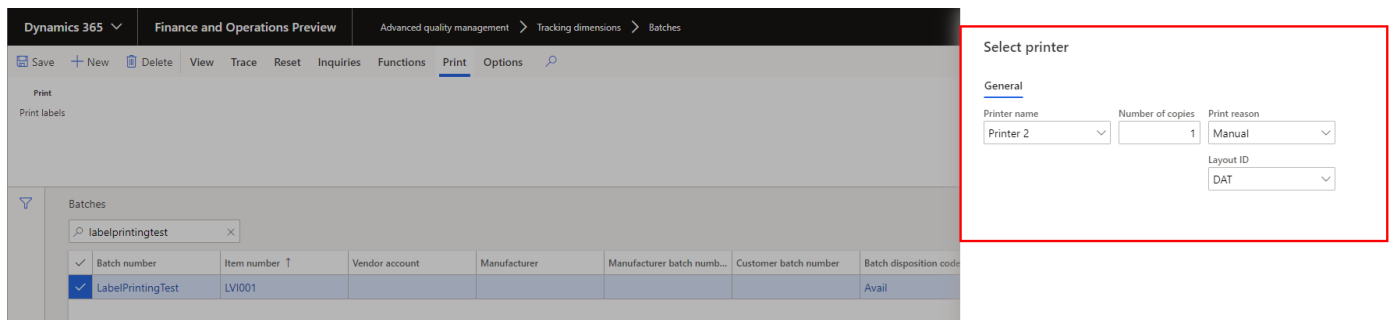
18. Click "Save".



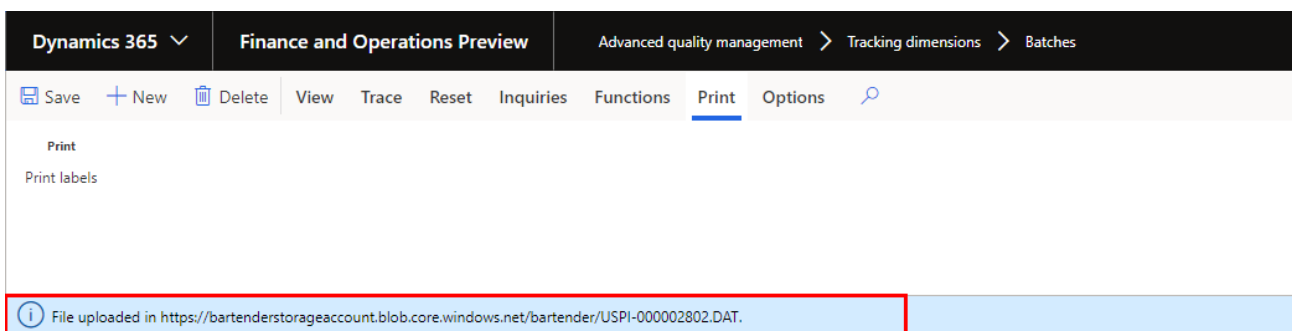
5.5 Example - Print documents from D365

Sign in D365 client.

Choose any document that needs to be printed from D365:



1. A confirmation message is displayed, showing the name of the document and the location where it was saved:



2. From Microsoft Azure (link: <https://portal.azure.com/#home>), go to the container of non-processed files (the first one created in chapter 5.1.2). Here it is possible to see the file correctly saved in the first container, waiting for the Logic App to be automatically activated.

NAME	MODIFIED	ACCESS TIER	BLOB TYPE	SIZE	LEASE STATE
USPI-000002802.DAT	10/14/2019, 11:50:41 AM	Hot (Inferred)	Block blob	146 B	Available

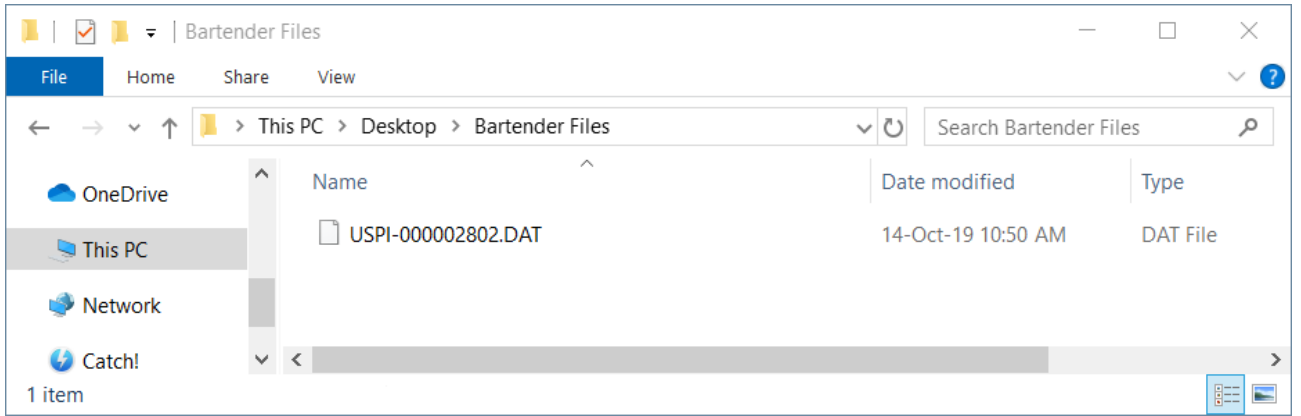
3. From the Logic App overview page, it is possible to verify its status.

STATUS	START TIME	IDENTIFIER	DURATION	STATIC RESULT..
Succeeded	10/14/2019, 11:50 AM	[REDACTED]	2.84 Secon...	

4. As a further confirmation, it is possible to verify that the document is not present anymore in the first container but has now been moved to the second one, where the processed files are stored.

NAME	MODIFIED	ACCESS TIER	BLOB TYPE	SIZE	LEASE STATE
USPI-000002802.DAT	10/14/2019, 11:50:50 AM	Hot (Inferred)	Block blob	146 B	Available

5. Finally, the file is now correctly transferred to the desired folder in the on-premises machine.



6. SETUP GUIDE FOR LABELING INTEGRATION TO CLOUD SOLUTION USING API CONNECTION

This setup guide applies when choosing to enable direct interaction between Dynamics 365 / Life Sciences Solution and third party label printing solution via HTTP APIs.

More details in general setup:

<https://learn.microsoft.com/en-us/dynamics365/supply-chain/supply-chain-dev/label-printing-using-external-label-service>

Setup required to prepare for NiceLabel Cloud integration:

<https://learn.microsoft.com/en-us/dynamics365/supply-chain/supply-chain-dev/label-printing-using-nicelabel>

Setup required to prepare for BarTender Cloud integration:

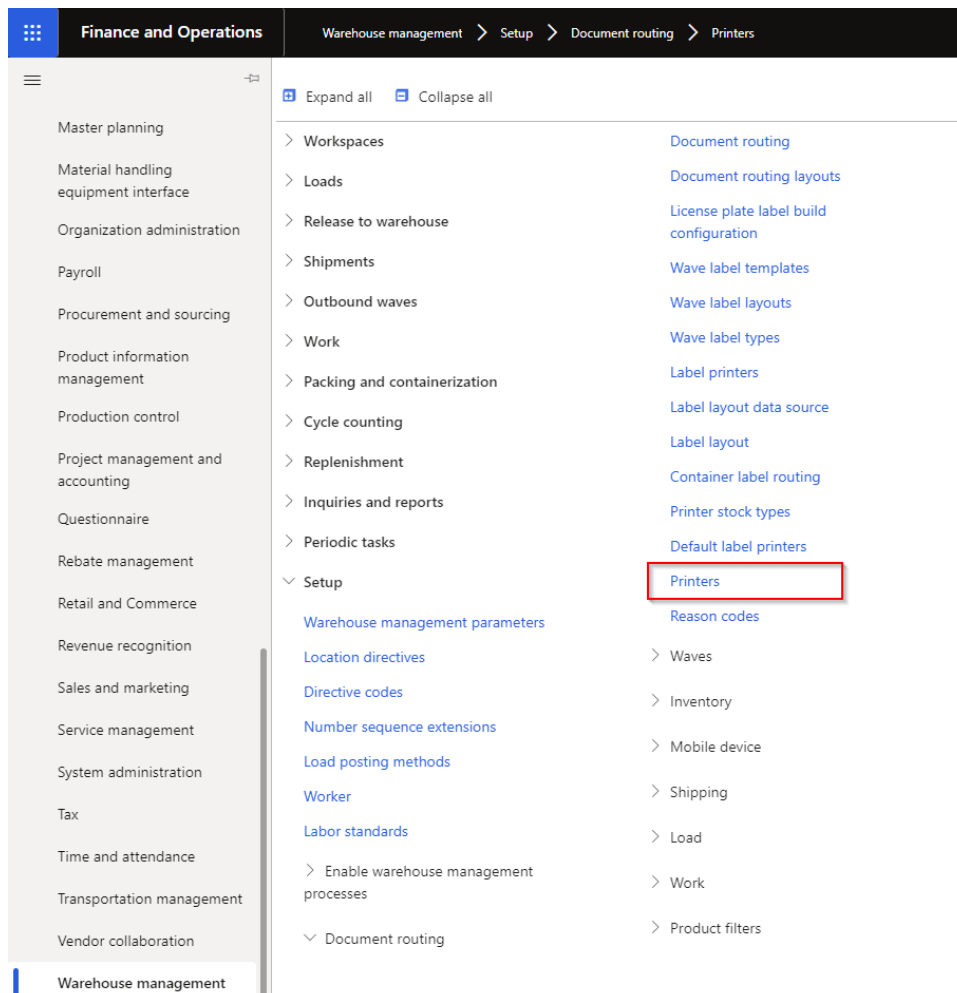
<https://learn.microsoft.com/en-us/dynamics365/supply-chain/supply-chain-dev/label-printing-using-bartender>

6.1 Setup in Dynamics 365

In addition to the general setup listed above, it is required to connect the SDN label printers with Microsoft label printers in order to use the API connection.

Sign in Dynamics 365 client.

1. Go to **Warehouse management > Setup > Document routing > Printers.**



2. In the **Printers** form, link the printers with cloud printers by defining the **Printer name** field.

Finance and Operations Warehouse management > Setup > Document routing > Printers

Printers

Standard view * v

Filter

Printer	Printer number	Warehouse	Zone ID	Location	Valid for	User relation	Printer name	Dispensing
Printer API		01			All		NL Printer	

NOTE: Printer name looks up to the **Label printers** form (**Warehouse management > Setup > Document routing > Printers**) where cloud printers are defined (i.e. **Connection type** “External label service”). The **Printers** form defines the list of printers that will be used as default in different processes (i.e. defined in the **Document routing** form) and displayed in the dropdown list upon manual label printing step.

7. DOCUMENT ROUTING AGENT

7.1 Overview

7.1.1 Printing overview in D365

In D365, you can print documents by using either a local printer or a network-connected device. In addition, you can export pages and reports directly from the client, as PDF files or Microsoft Office documents. Finally, the distributed workload lets you print business documents directly from a mobile device by using network resources.

Printing documents on network devices from hosted applications presents a unique set of challenges. Here are some examples:

1. Print drivers might not be available on the user's device.
2. The user's device might not be connected to the corporate network.

By using a dedicated host and following a few easy steps, system administrators can configure deployments so that users can print directly from business applications on network devices.

In addition to the platform that is deployed to the Azure subscription, Finance and Operations applications provide customers with an integrated, first-party Azure application that helps them more easily use domain-hosted devices to print documents.

7.1.2 Service overview

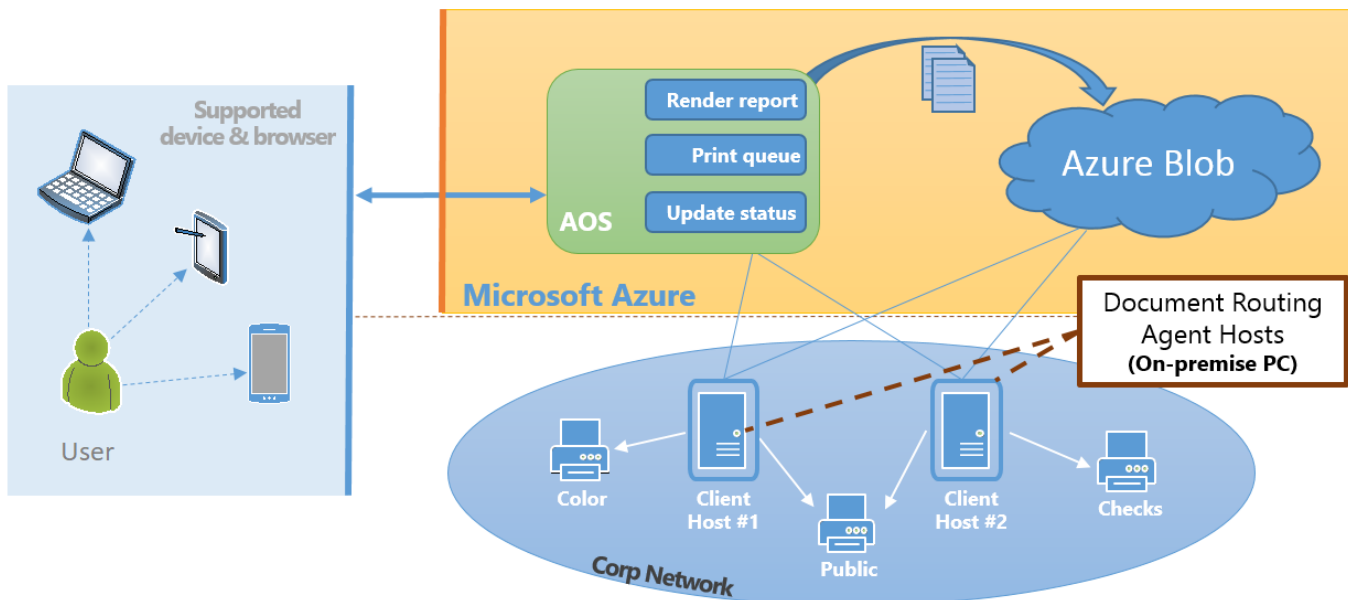
While documents that are produced by the hosted applications are waiting to be printed on a network-connected device, they are stored in Azure blob storage. The Install the Document Routing Agent to enable network printing uses Azure authentication to establish a secure channel to the Azure services.

Execution sequence:

1. The report is generated by Microsoft SQL Server Reporting Services (SSRS) and stored in Azure blob storage. Attached printer settings are stored together with the document.
2. The Document Routing Agent queries the Azure Service Bus queue for active jobs.
3. The document is downloaded by the Document Routing Agent and spooled to the network printer.

7.1.3 Service components for network printing

The following diagram shows the basic components that help support network printing operations.



Network printers that are registered for applications can be used by all legal entities (also known as companies) that are defined in the environment. Network printer settings are company-specific. Therefore, administrators can restrict access, based on the user's active company. For example, users in the active company might have access to all the network printers that are registered by the Document Routing Agent. However, users in another company won't have access to those printers until access is explicitly enabled for that company.

7.2 Installation of the Document Routing Agent

1. In D365, open the **Manage network printers** page (click: **Organization administration > Setup > Network printers > Manage network printers**).

The screenshot shows the 'Manage network printers' page with the 'Options' tab active. The 'Application' group contains the link 'Download document routing agent installer'. Below the navigation bar, there is a table of network printers:

Name	Description	Path	Active
HP M277 Regus		HP M277 Regus	No
Regus printer		Regus printer	Yes
Zebra Test Printer		Zebra Test Printer	Yes

2. On the **Options** tab, in the **Application** group, click **Download document routing agent installer**.

This screenshot is identical to the previous one, but the 'Download document routing agent installer' link in the 'Application' group is highlighted with a red rectangular box to indicate it should be clicked.

3. Run the downloaded file to begin the installation process.
4. Complete the setup process.

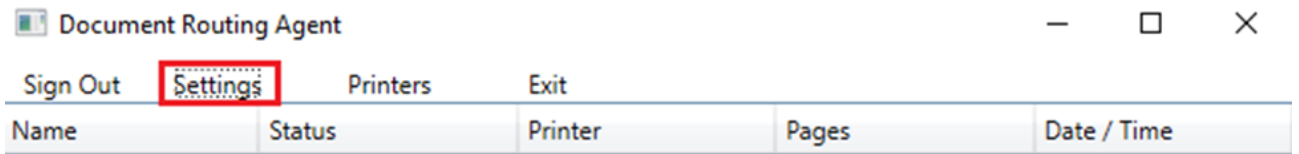
NOTES: Only one Document Routing Agent can be installed in one server. One Document Routing Agent can point to only one instance of D365.

One printer can be referred to from many Document Routing Agents. One instance of D365 can refer to many Document Routing Agents.

SDN suggests defining at least two Document Routing Agents for the production system, for load balancing and high availability reasons.

7.3 Document Routing Agent configuration

1. Close all browser instances that are running the application. This resets the local Azure authentication tokens.
2. On your desktop, run the Document Routing Agent.
3. On the toolbar, click **Settings**.



Waiting for next document .. Last checked: 10:16:53

4. Add the following settings:
 - a. **Application ID:** The ID that is unique to the application and should be entered automatically.
 - b. **Finance and Operations URL:** The base URL of the application.
 - c. **Azure AD tenant:** The domain name of the Azure AD.
5. Click **OK**.
6. Click **Sign In** to sign to your account. The account must share the same domain as the Azure AD associated with the application. The Document Routing Agent is ready to process documents and the Printers button are available on the toolbar.

7.4 Register network printers

1. On the toolbar, click **Printers**.
2. Select the printers to make available in the applications.

Printers ×

Selected	Printer name	Printer path
<input checked="" type="checkbox"/>	VSN-2N-251-CLR	\\far-vprint-01a\VSN-2N-251-CLR
<input type="checkbox"/>	Microsoft Print to PDF	Microsoft Print to PDF
<input type="checkbox"/>	Fax	Fax
<input type="checkbox"/>		

- Specify a default name for the printer.
- Click **OK**.

7.5 Administer network printers

- Open the **Manage network printers** page (click: **Organization administration > Setup > Network printers > Manage network printers**).

[Edit](#) | [Options](#) | [Search](#)

Personalize

Always open for editing

Personalize this page

Add to workspace ▾

Page options

Security diagnostics

Advanced filter or sort

Record info

Go to ▾

Share

Get a link ▾

Create a custom alert ▾

Manage my alerts

Power Automate

See your flows

Create a flow

Application

Download document routing agent installer

Preview

System network printers

Manage network printers

Standard view ▾

Filter

Name	Description	Path	Active
<input type="radio"/> HP M277 Regus		HP M277 Regus	No
Regus printer		Regus printer	Yes
Zebra Test Printer		Zebra Test Printer	Yes

- Edit the existing entries that are mapped to each network printer. As part of your changes, edit the connection path.
- To include a printer as an option in the Print Destinations field, set the **Active** field to "Yes".

Edit | **Options** 🔍

Personalize | **Page options** | **Share** | **Power Automate** | **Application** | **Preview**

Always open for editing | Security diagnostics | Record info | Get a link ▼ | Create a custom alert ▼ | See your flows | Download document routing agent installer | System network printers
 Personalize this page | Advanced filter or sort | Go to ▼ | Manage my alerts | Create a flow

🔍 Manage network printers

Standard view ▼

<input type="radio"/> Name	↑ Description	Path	Active
<input type="radio"/> HP M277 Regus		HP M277 Regus	No
Regus printer		Regus printer	Yes
Zebra Test Printer		Zebra Test Printer	Yes

Most of the information of this chapter is extracted from the following webpages (as of 18th May, 2022):

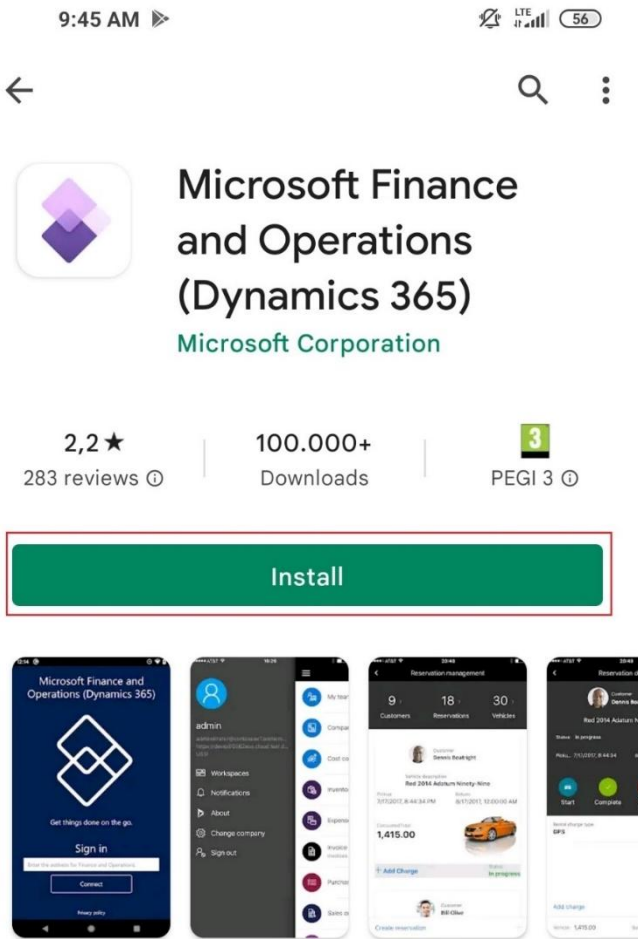
<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/analytics/print-documents?toc=%2Fdynamics365%2Fcommerce%2Ftoc.json>

<https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/analytics/install-document-routing-agent>

8. MICROSOFT FINANCE AND OPERATIONS (DYNAMICS 365) APP INSTALLATION

Note: It is possible to install the Microsoft Finance and Operations (Dynamics 365) app only on mobile devices. Currently, a desktop version is not available.

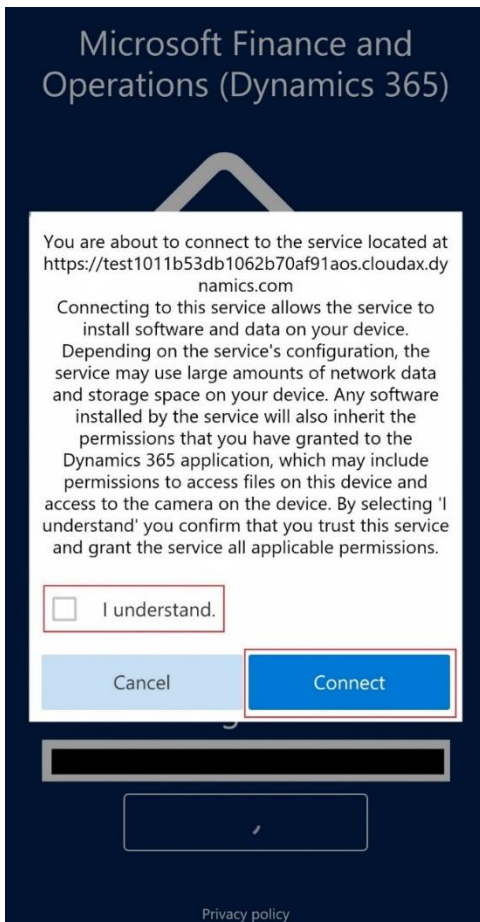
- Go to the **Play store**, search for "Microsoft Finance and Operations (Dynamics 365)", select the app and click **Install**.



- Open the app. In the Sign in field, enter the link to the D365 environment and click Connect.



3. Tick the "I understand" checkbox and click Connect.



4. Sign in, using the email and password related to your user.

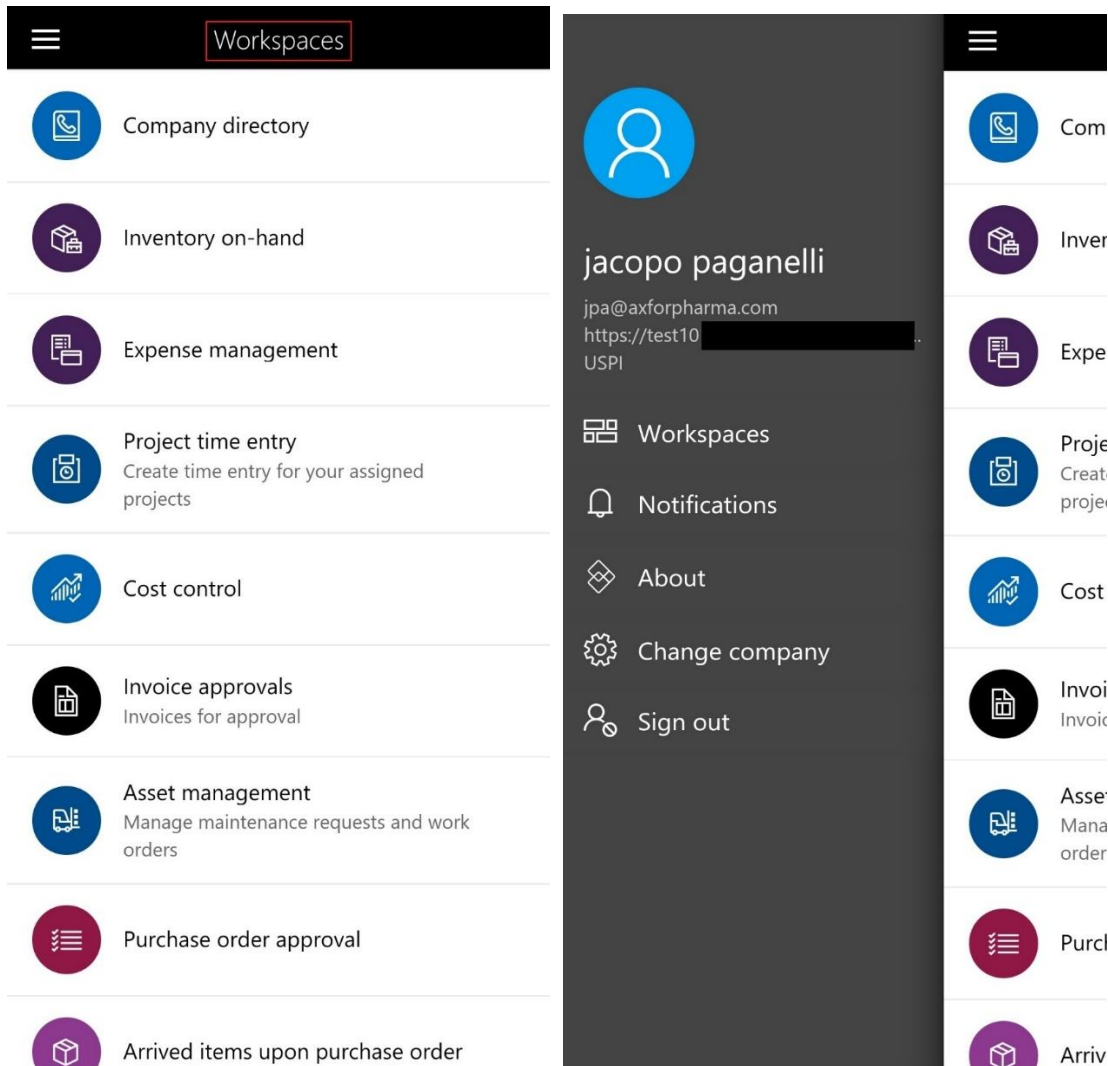
Sign in

Email, phone, or Skype

[Can't access your account?](#)

Next

5. The user is connected to the app and all the available workspaces are displayed.



9. ATTACHMENT A

This chapter contains a list of links related to material, documentations, FAQs, etc. that Microsoft sent by email during the initial steps of the configuration of a project. These links are updated as of May 2022.

Please find below some helpful links:

1. [Implementation lifecycle management](#)
2. [Microsoft FastTrack for Dynamics 365 overview](#)
3. [Development and administration for Dynamics 365 for Finance and Operations](#)
4. [One Version service updates FAQ](#)
5. [Go Live FAQ](#)
6. [Tech talk videos](#)
7. [What's new or changed for all new features](#)
8. [Connect with FastTrack team and other community members offline](#)
9. [Dynamics 365 for Finance and Operations - Help and Support plans](#)
10. [YouTube Dynamics 365](#)
11. [Licensing Guide](#)
12. [Cloud Services Operations Guide](#)
13. [For information on privacy, compliance, and security procedures](#)
14. [Terms and Conditions of Microsoft Services](#)
15. [Refer to Online Services Terms \(OST\) section and download the document after selecting the language](#)
16. [Lifecycle Policy](#)
17. [Support Options](#)

10. ATTACHMENT B

Below, some elements of the e-mail sent by Microsoft during the initial phase of the project configuration (May 2022).

10.1 Support:

In [LCS](#), use Issue search to find Microsoft Knowledge Base (KB) articles, hotfixes, and workarounds for reported issues in Finance and Operations. You can track fixes that are important for you as they are being worked on to ensure you are informed when they are ready.

[Issue search \(Lifecycle Services, LCS\)](#)

Additionally, all Dynamics 365 Customers have a minimum of **Subscription Support** plan which is included with their cloud subscription. However, if you've purchased any additional support plan, you're entitled to additional benefits. Please refer to the following links:

[Microsoft Dynamics 365 Support](#)

[Find support for Microsoft Dynamics 365 for Finance and Operations, Enterprise edition and Dynamics Lifecycle Services](#)

10.2 Servicing Requests:

You can submit requests directly to the Dynamics Service Engineering (DSE) team in Lifecycle Services (LCS). See the following link to understand when to use Service requests in LCS

[Submit a request to the Dynamics Service Engineering team](#)

10.3 Community:

During your implementation, if you have any questions on implementation best practices, search or post your questions in the FastTrack team managed [Community Forum](#).

10.4 As you get closer to Go-Live:

You may receive an email from the Microsoft FastTrack team to review the Go-live readiness of your project. This is a mandatory step before requesting the production environment. Please go through [Preparing for Go-live](#) for more details.

If you're close to your Go-live date and you've already/almost completed your UAT, please follow the steps below:

[Download the Pre Go-live Checklist](#)

Fill it in

Send it to go-live@microsoft.com

The FastTrack team will review your project and get back to you with an assessment of your readiness.

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